Pennsylvania Department of Health Access to Recovery

PROVIDER USER MANUAL

VERSION 1.0

January 2011

1-888-600-4777
paatrsupport@kitsolutions.net

KIT Solutions®, LLC
5700 Corporate Drive
Suite 530
Pittsburgh, PA 15237

TABLE OF CONTENTS

Tips for Using the Application Effectively....4
- Recommended Computer Settings....4
- Application Navigating....5
  - Menu Information....6
  - Landing Page....7
  - Listing Page....8
  - Edit Forms....11
- Data Fields and Buttons....12
  - Edit Form Buttons....14
  - Additional Buttons....14

Login Procedure....16
- Service Announcements....17
- Forgot User ID?....18
- Forgot Password?....19
- Account Activation....21

Home....23

Eligibility Tool....28
- Adding a Client....28
  - Editing a Client....29
  - Deleting a Client....30
  - Eligibility Screening....31

Assessment....32
- Client Information....32
  - Updating Client Information....32
  - Locator Tracking Form....35
- Voucher Information....38
  - Start Assessment....39
  - Administer Intake GPRA....40
  - Print/Scan Signature Forms....42
  - Create/Modify Voucher Service Plan....44

Services....48
  - Add a Service Record....48
  - Editing a Service Record....50

 © KIT Solutions® 2011

Deleting a Service Record 51
Utilize Data 52
Standard Reports 52
Selecting a Standard Report 52
Administration 54
Staff 54
Adding a Staff Member 54
Permissions 56
Editing a Staff Member 57
Deleting a Staff Member 58
Manage Provider 59
Viewing and Editing Provider Details 59
Viewing and Editing Location Details 60
Change Password 62
Manage Events 63
Adding an Event 63
Editing an Event 65
Deleting an Event 66
Manage Messages 67
Adding a Message 67
Editing a Message 68
Deleting a Message 69
Knowledge Base 70
Web Links 70
Library 71
Location Directory 72
Support 73
Web Site 73
Chat 74

 © KIT Solutions® 2011

TIPS FOR USING THE APPLICATION EFFECTIVELY

Recommended Computer Settings

Screen Resolutions

You will get the best screen layout if you set your PC monitor settings to 1024 X 768 or larger. If your screen resolution is smaller (e.g., 800 x 600 pixels), everything on the screen will appear larger. But, if you use 800 x 600 pixels you will have to scroll more both up and down and left and right to access all the data fields.

Pop-Up Blockers

Modern computer security technology and usability features development have led to pop-up blocking. Although this new feature of Internet browsers, toolbars and other 3rd party managing software blocks hazardous and annoying pop-ups, sites like the ATR application require pop-ups to be able to function. If your pop-up blocker is enabled, then there is a possibility that the ATR application may not function or appear properly. You should either disable the pop-up blocker while using the ATR application (while remembering to enable it, if desired, when not using the ATR application) or create exceptions for the pop-up blocker. Although enabling and disabling the pop-up blocker may be cumbersome, it may be easier than making exceptions to the pop-up blocker.

To create exceptions for the pop-up blocker, open your internet browser window. If using Internet Explorer, click the top toolbar option "Tools" and then go to "Internet Options". After the Internet Options window is available, you will want to click on the "Privacy" tab at the top of the window. You will notice while on the "Privacy" tab at the bottom will be a section on Pop-Up Blockers. If you "Block pop-ups" checkbox is checked, click on the "Settings" button to allow for exceptions. If using Mozilla Firefox, click the top toolbar options "Tools" and then go to "Options". After the "Options" window is available, you will want to click on the "Content" tab at the top of the window. If you "Block Popup Window" is checked, click the "Allowed Sites" button to the right to allow for exceptions.

You can now add the ATR application links to the "Allowed Sites" list which the pop-up blocker will ignore when trying to block pop-ups from the ATR application. You will want to add https://kitservices3.kithost.net/paatr/ for the Live system. Once this site is added to your "Allowed Sites" list, the pop-up blocker should no longer prevent pages from loading and appearing while you are using the ATR application.

Print Icon

The ATR Application has the print icon for easier access to viewing reports, you may need to have Active X installed on your computer to utilize the icon. Active X is a free download that should allow you to use the print icon, click on this link to access the Active X site: http://www.download.com/windows/activex/1921-2206_4-0.html If you are unable to download Active X, contact your organization's IT department. Firefox does **not** official Support AciveX. http://support.mozilla.com/en-US/kb/ActiveX

*Note: These are instructions for Internet Explorer 7.0 and may be different for other Internet Explorer versions.

© KIT Solutions® 2011

Application Navigating

The ATR Application is set up in such a fashion that moving from Left to Right on the menu is the best approach to using the application. Start at Assessment, filling in all the information for that area before moving on to the next section. Continuing in this manner will ensure that all of the sections of the application have enough information to function correctly. If all of the different portions are not completed, some modules will not work correctly.

Computer Keys

While entering information into a form, several keys are helpful for moving the cursor from one information box (called a data field) to another. The table below summarizes those keys:

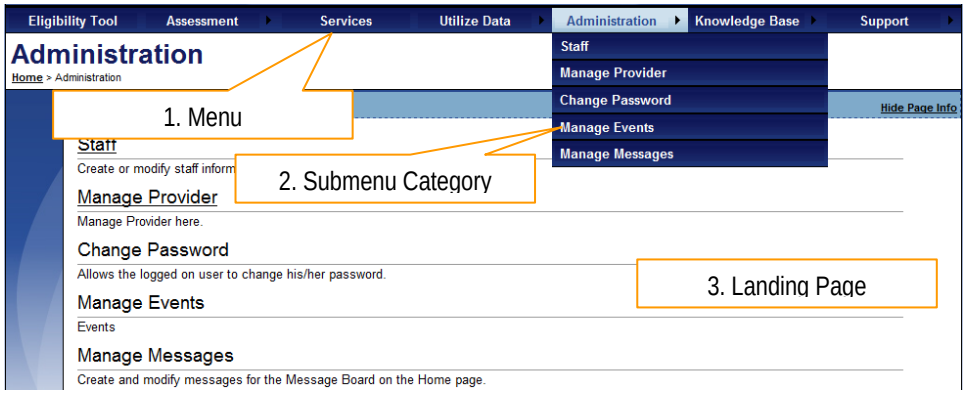
Key	Description	Function
	The Cursor	Points to desired location
	The TAB key	Moves the cursor to the next data field
	Hold down the SHIFT key and then press the TAB key	Moves the cursor to the previous data field
	The Control (Ctrl) key	Enables blocked material to open (due to pop-up blocker)
	Use the MOUSE by pointing and clicking to move the cursor	Moves the cursor by pointing and clicking

© KIT Solutions® 2011

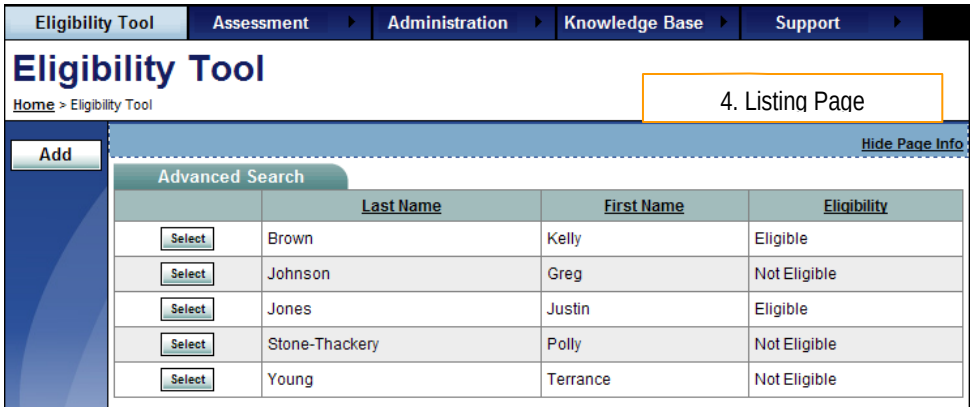
Menu Information

The Menu for the application is located across the top of the screen. Some Menu categories may be broken down into submenu categories to choose from. The Menu categories list the main modules that are within the application. When a Menu category is selected a list of submenu categories will be displayed on the Landing Page as links to access the modules. (For more information on Landing Pages, see the Landing Page section.)

1. Menu — Constant (unchanging). Available at all times.
2. Submenu Category — Varies depending on which Menu category is selected.
3. Landing Page — Varies depending on which Menu category is selected.
4. Listing Page — Varies depending on which submenu category is selected.



(This is a screenshot displaying the Menu (1), Submenu (2), and a Landing Page (3))



(This is a sample screenshot displaying a Listing Page (4))

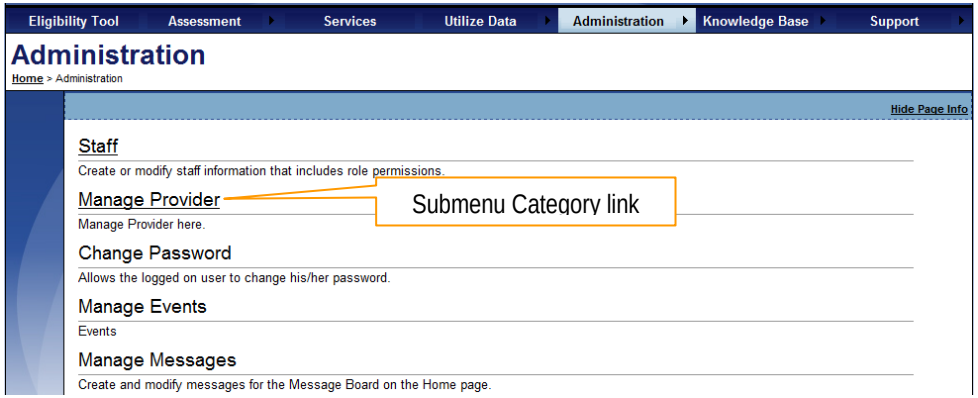
© KIT Solutions® 2011

Landing Page

When first entering a main module you will see a list of the entire submenu categories associated with that module. This is called a "Landing Page". The Landing Page of each module provides a description of what can be done in that module as well as listing each submenu category as a link to the Listing Page and entry forms. (For more information on the Listing Pages, see the Listing Page section.) No data is entered on the Landing Page.

To open a category:

- Click on the Submenu Category Landing Page link.



(This is a partial screenshot displaying a Landing Page)

Tips

- Hide Page Info — Allows the module description to be hidden from view
- Show Page Info — Places the module description back in view

© KIT Solutions® 2011

Listing Page

After selecting a category from the Landing Page you will see the "Listing Page". When going into an area where a Listing Page is available, the service allows you to select previously entered data to edit or view its content. No data is entered on the Listing Page.

- When viewing a Listing Page, all of the data is available for Searching. (See the Advanced Search section for more details on searching.)

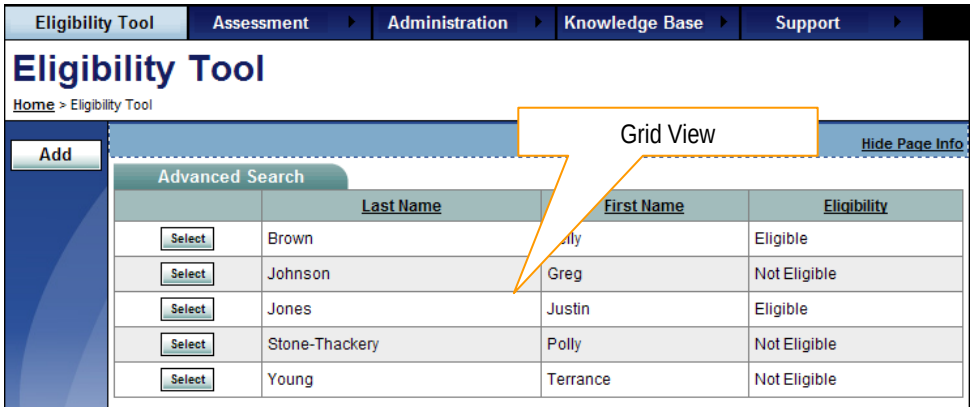
There are three types of Listing Pages:

1. Grid View
2. Hierarchy View
3. Single Form View

Grid View

The Grid View displays the data in tables. Specific pieces of data will be displayed within the Grid based on the fields within the entry/edit form.

1. When first viewing a Listing Page, all of the data is available for Searching. Click the Select (Select) button to the left of the data you would like to edit/view.
2. You will be taken to the entry/edit screen. This page will be in edit mode (all data fields will be open for data entry). Make any changes needed to the form. Click the Save (Save) button to save the changes.



(This is a sample screenshot displaying a Listing Page)

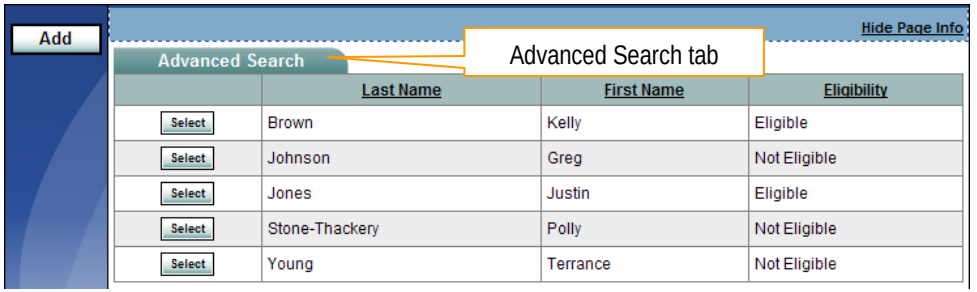
Tips

- Clicking on the field name in a Category field (e.g., First Name) will allow you to sort through your files in ascending or descending order.
- The Page numbers (e.g. 1 2 3 4 5) beneath the grids allows to you move from page to page within the specific listing page. There is a maximum of 8 items in a grid, so once you exceed 8, the application automatically updates the grid to page 2. To get to a desired page click on the number and you will go to that specified page.

© KIT Solutions® 2011

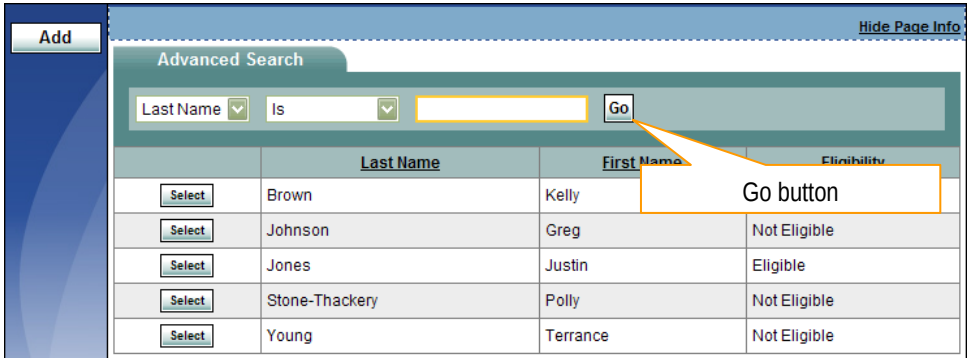
Advanced Search

- To filter a search, click the Advanced Search (Advance Search) tab located at the top of the Grid.



(This is a sample screenshot of a Data Grid displaying the Advanced Search tab.)

- The Advanced Search option allows you to limit search results. Select an option from the three search filter fields. Once the three search filter fields have been selected, click the Go (Go) button to see the search results.
- The three search filter fields are used in the following methods:
    1. The first search filter will display the search categories to choose from.
    2. The second search filter allows you to specify how you wish to search.
    3. The third search filter is the search criteria. This field will change based on the second search filter selected.



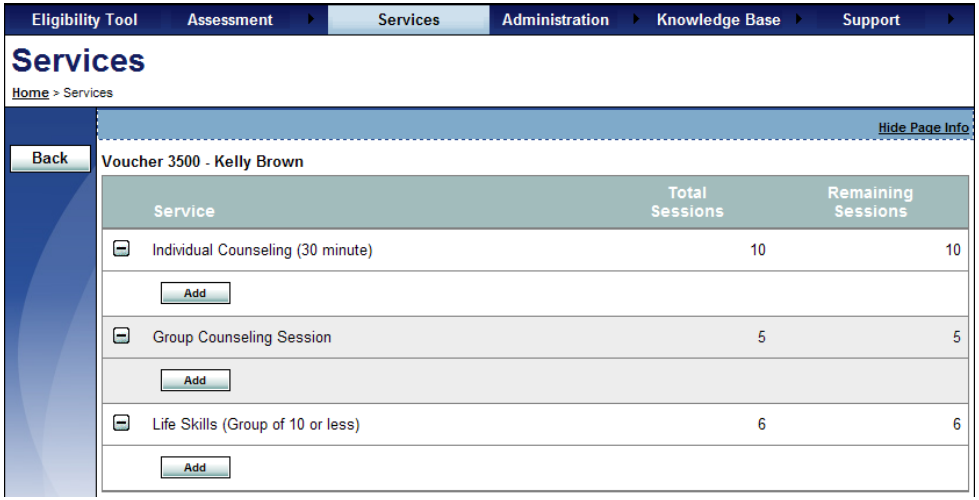
(This is a sample screenshot of Advanced Search displaying the search filter fields.)

© KIT Solutions® 2011

Hierarchy View

A Hierarchical View is used when Adding/Editing within the Service Menu. Looking at the example, the service record is associated with the Treatment Service Type. The hierarchical view was designed to simplify these tasks.

- When first viewing the Listing Page, you will need to click the ⊞ (plus sign) to activate the hierarchy view. The + will become a⊟ (minus sign)and all the data will display below the link
- To enter, edit or delete information within the link, click on the desired link.

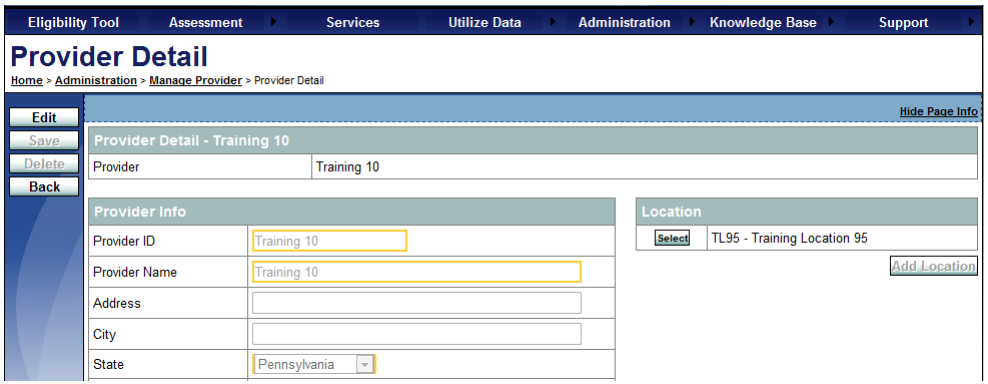


(This is a sample screenshot displaying a "Hierarchy View".

Single Form View

The Single Form View is used when the data entered is updated periodically. Only one form is available and edited. The Single Form View displays the fields on the Edit Form.

- The form can be edited at any time, but you must click the Save (Save) button to update the data.



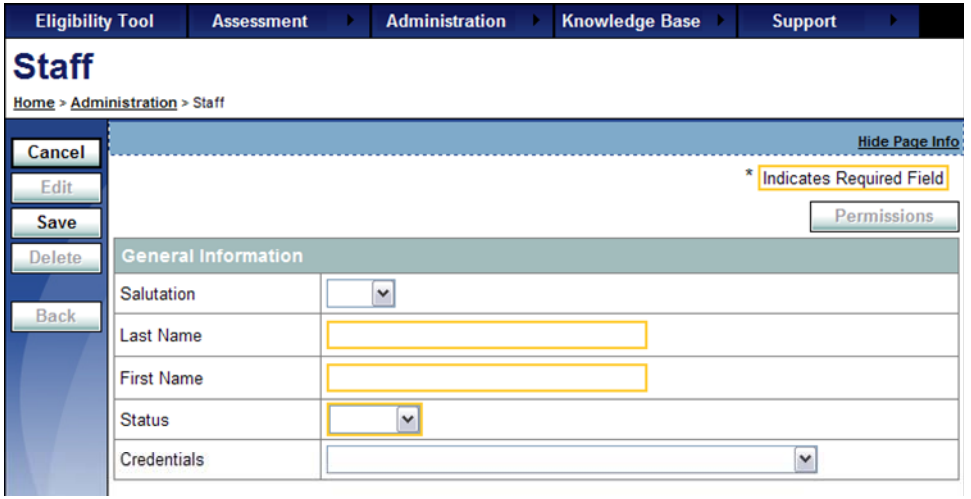
(This is a sample screenshot displaying a "Single Form View" Page.)

© KIT Solutions® 2011

Edit Forms

The Edit Form contains the fields for entering and editing data. The buttons for saving, cancelling, deleting, printing, and in some cases, adding and editing, are available at the top right of the page. (See the Data Fields & Buttons section for additional details on the function of these buttons.)

- If you clicked the Add (Add) button to enter new information into a form, the Edit Form data fields will be blank.
- When selecting the Select (Select) button to view existing data, the Edit form data fields will display the data entered/selected previously. These fields may be modified, if needed.



(This is a sample screenshot displaying a blank Edit Form.)

© KIT Solutions® 2011

Data Fields and Buttons

In the ATR application there are several fields, boxes and buttons that are used to collect and store data.

Type	Preview/Description
Text Field (aka Text Box)	(fill in the blank)
Dropdown List (aka Pull Down Menu)	Please Select (select one)
Radio Buttons	Selected Not Selected
Check Boxes	Selected Not Selected
First Name	A yellow field denotes a required field
Calendar	(See the Calendar section for additional details.)

It does not matter the order in which the above fields are filled in, but if a required field is not filled in and you try to save the form, you will receive a message informing you what field is missing data and you will not be able to save the form until that field has data.

Tips

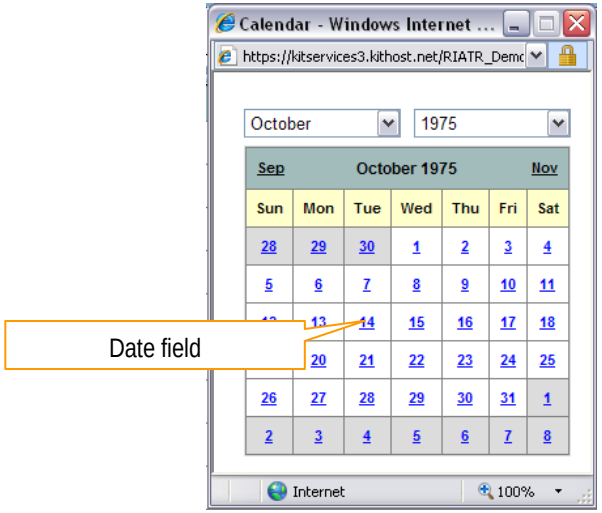
- All the fields within a yellow box are required fields. These must have a value entered before the record can be saved.
- You can type an identifying letter of an item in a dropdown list and the first selected beginning with that letter will appear in the box.

© KIT Solutions® 2011

Calendar

Dates can be entered in two different ways: 1) typing the date directly into a date field as mmddyyyy or 2) using the (Calendar) icon. The (Calendar) icon can be used as an alternative option to entering a date directly into a date field.

1. Click the (Calendar) icon. A new window will open displaying a calendar.
2. To change the month, use the month links on the top corners of the calendar.
    a. Click the left month link to go to the previous month.
    b. Click the right month link to go to the upcoming month.
    c. If the date is not within the months displayed, you can select the Month and Year by using the dropdown lists.
3. Once the correct month is displayed, select the date by clicking on a number within the calendar.



(This is a screenshot displaying the calendar feature.)

© KIT Solutions® 2011

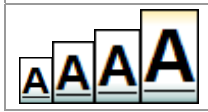
Edit Form Buttons

Information is entered and edited on the computer screen through data entry/edit forms. The table below summarizes the buttons used to enter/edit information located to the left of each form. This is referred to as the "left toolbar".

Add	Must be pressed first to add new information to a form
Edit	Must be pressed to modify existing information
Save	Adds the information on a form to the ATR database
Delete	Removes the information currently on a form from the ATR database
Cancel	Cancels the Add or Edit without saving any information entered

Additional Buttons

Below are some additional buttons that may appear within a form.

Back	Returns you to the Listing Page
Submit	Forwards the approved information to the appropriate parties for further consideration.
Export	Downloads the selected file into the desired format.
Select	Opens the information in the enter/edit form for viewing or modifications
	Changes the text size by clicking on one of the different sized s (For more information, see the Using the Text Resizer section)

 © KIT Solutions® 2011

Using the Text Resizer

You can alter the size of the text on a form by using the Text Resizer . Clicking on one of the s changes the text size from smallest to largest. Place the mouse pointer over one of the s and left click to change the size.

	Provides the smallest text size
	Provides the default text size
	Provides a medium text size
	Provides the largest text size

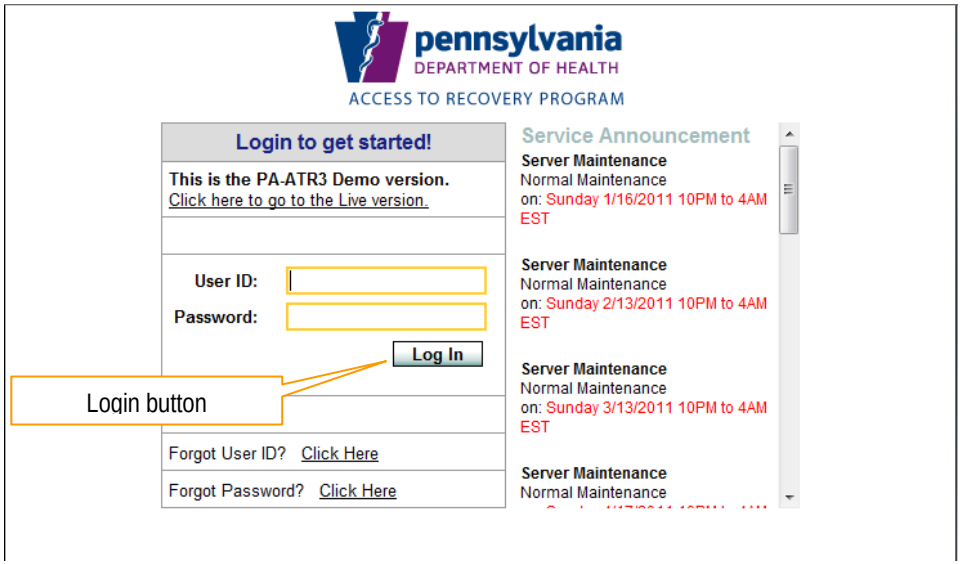
© KIT Solutions® 2011

LOGIN PROCEDURE

Connect to the Internet using an Internet browser. In the Address field, type in the following address and press Enter on your keyboard:

Live Data: https://kitservices3.kithost.net/paatr

1. Type the login name provided by your acting administrator in the User ID* field.
2. Type the password in the Password* field.
3. Click the Log In (Login) button.



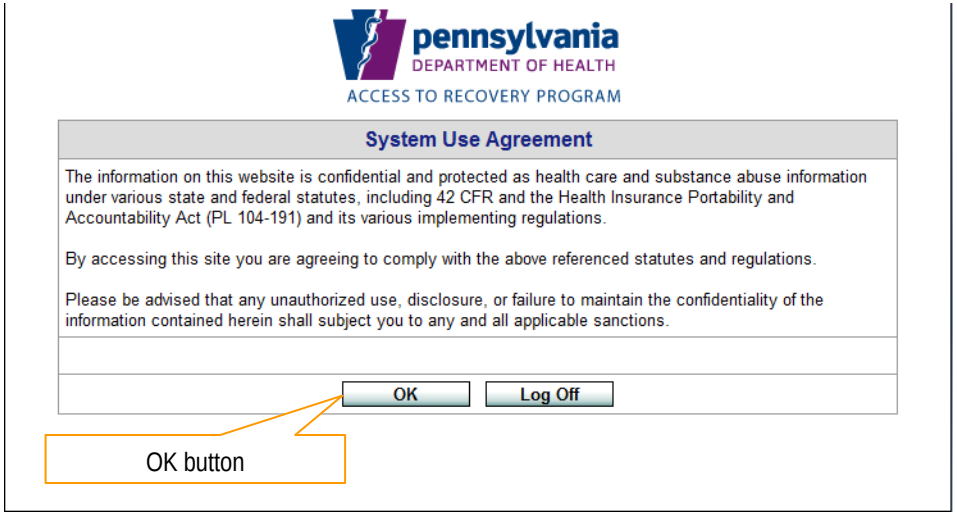
(This is a screenshot of the Login page)

Tips

- The User ID* IS NOT case sensitive.
- The Password* IS case sensitive.

© KIT Solutions® 2011

4. To enter, you must read and agree to the System Use Agreement by clicking the OK (Ok) button.
   *Note: If you do not wish to log in, click the Log Off (Log Off) button.

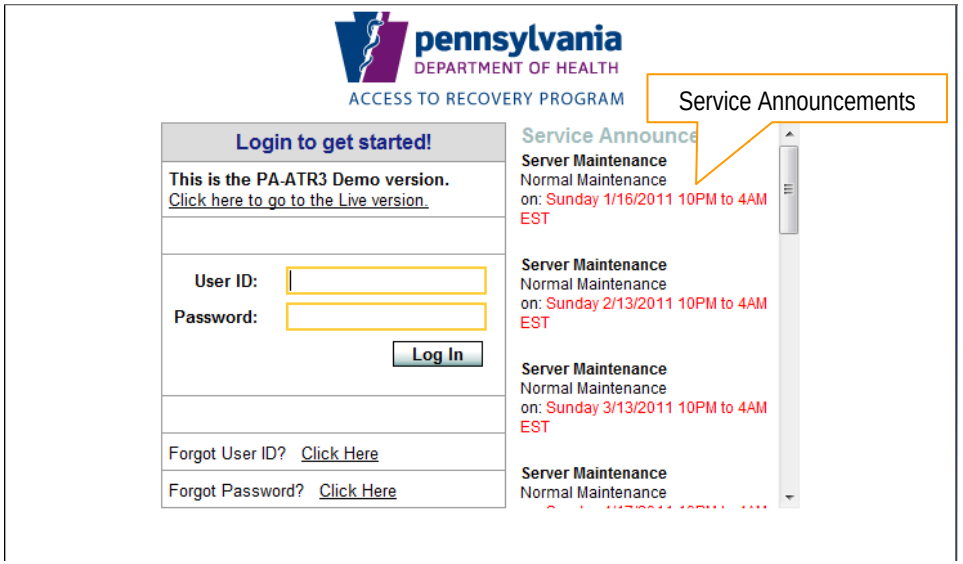

pennsylvania
DEPARTMENT OF HEALTH
ACCESS TO RECOVERY PROGRAM
System Use Agreement
The information on this website is confidential and protected as health care and substance abuse information under various state and federal statutes, including 42 CFR and the Health Insurance Portability and Accountability Act (PL 104-191) and its various implementing regulations.
By accessing this site you are agreeing to comply with the above referenced statutes and regulations.
Please be advised that any unauthorized use, disclosure, or failure to maintain the confidentiality of the information contained herein shall subject you to any and all applicable sanctions.
OK
Log Off
OK button

(This is a screenshot of the System Use Agreement Screen)

Service Announcements

The Service Announcements that are located on the Login Page are there to notify users that the Service is receiving any necessary server updates. The Service may be down for a short period of time which means you will not be able to log into the Service or save any data at that time.

Service Maintenance typically occurs once a month.

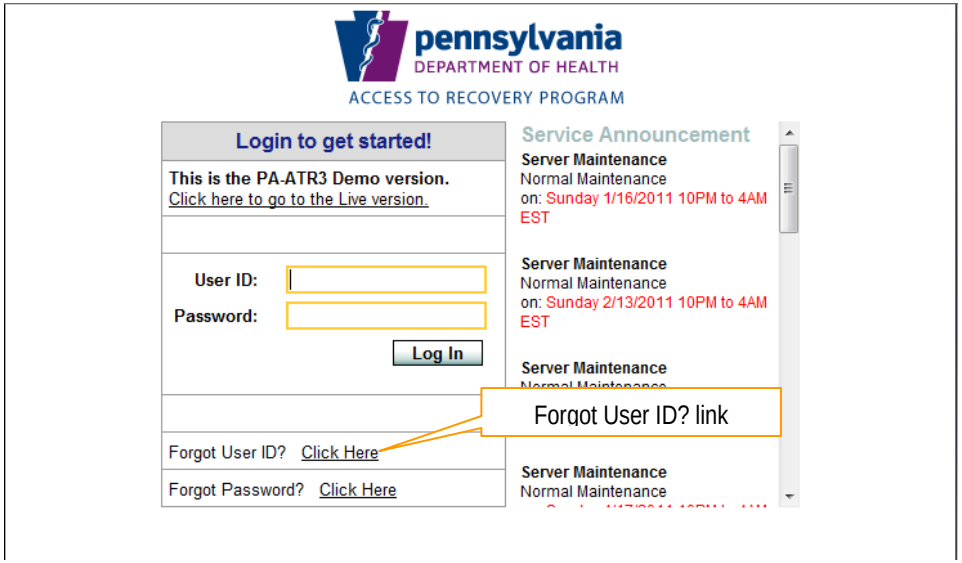


(This is a screenshot of the Login page)

© KIT Solutions® 2011

Forgot User ID?

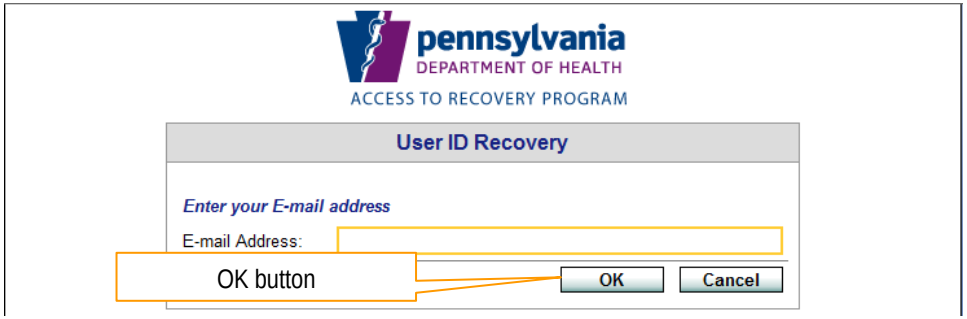
If you are unable to log into the ATR application due to forgetting your User ID, you can retrieve this information by clicking the link (entitled Click Here) next to Forgot User ID?



(This is a screenshot of the Login page)

1. Enter the email address associated with your account in the **E-mail Address** field.
2. Click the OK (OK) button.

You will receive a message that User ID information was sent to the email address specified. An email will then be sent supplying you with the User IDs associated with the specified email address.

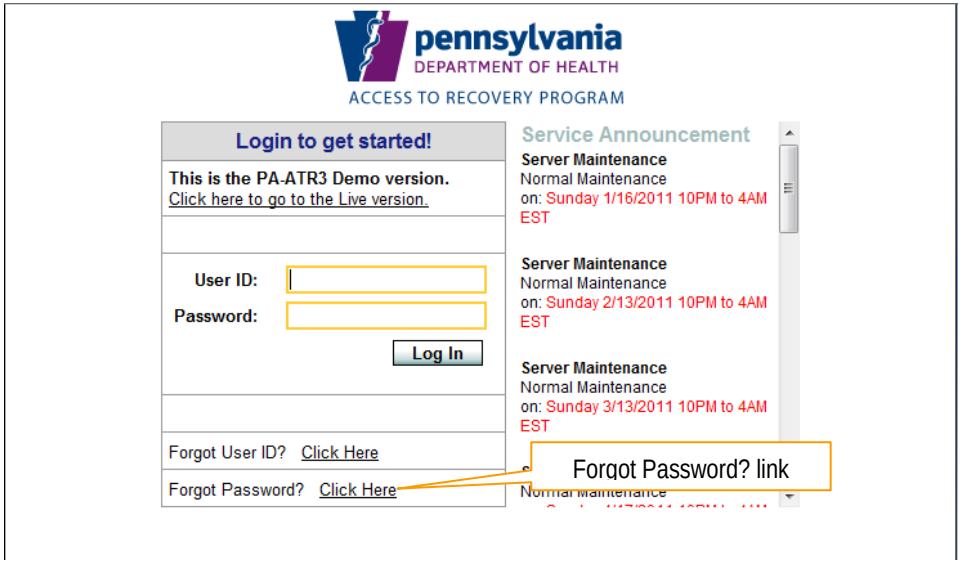


(This is a screenshot of the User ID Recovery screen)

© KIT Solutions® 2011

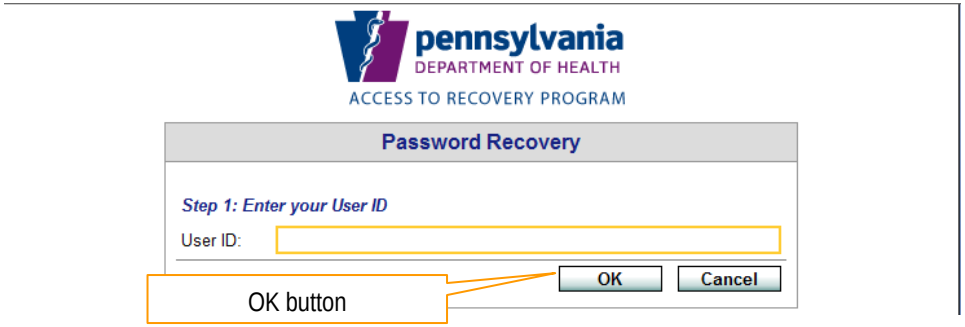
Forgot Password?

If you are unable to log into the ATR application due to forgetting your Password, you can retrieve this information by clicking the link (entitled Click Here) next to Forgot Password?



(This is a screenshot of the Login page)

1. Type the login name provided by your acting administrator in the User ID* field.
2. Click the OK (OK) button.

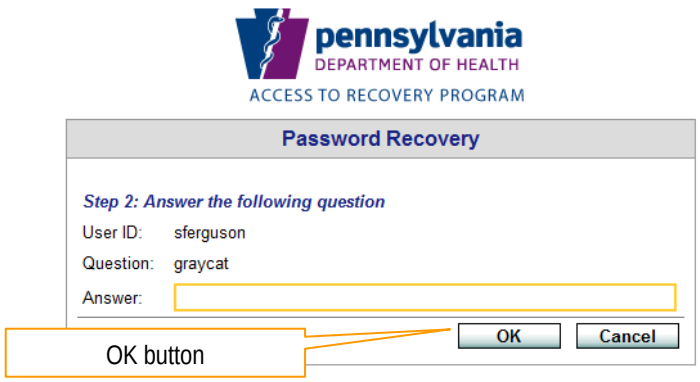


(This is a screenshot of the Password Recovery Screen)

© KIT Solutions® 2011

3. Enter the answer to the password question you specified when your account was activated in the Answer: field.
4. Click the OK (OK) button.

You will receive a message that your password has been reset. An email will be sent to the email associated with the User ID with a link to reset the password. See Account Activation for details on resetting your password.



(This is a screenshot of the Password Recovery Screen)

Tips

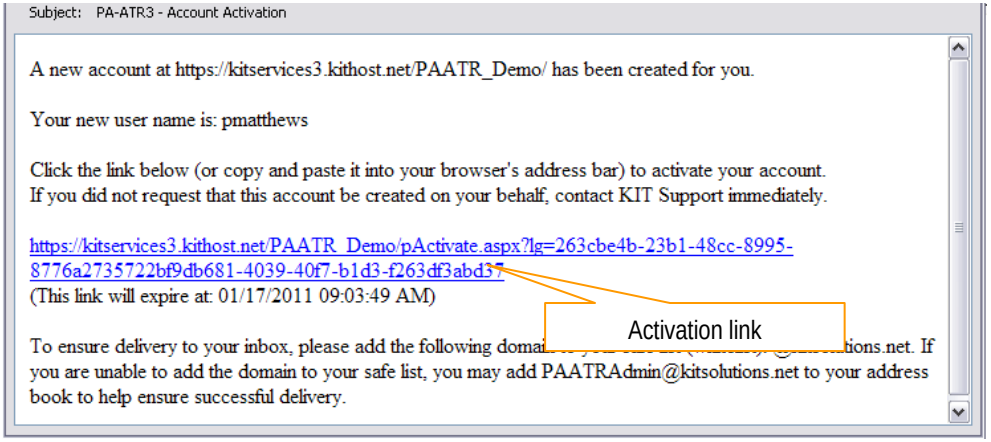
- If you have not activated your account, you will not be able to use the Forgot Password feature.
- Password Answers are case-sensitive.

© KIT Solutions® 2011

Account Activation

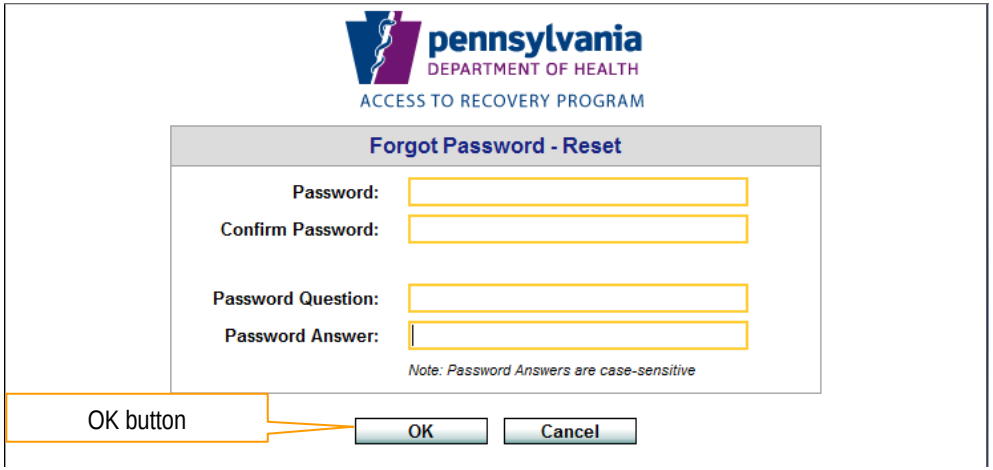
Your login information is created for you by your system administrator (IT Manager). In order to log into ATR for the first time you will need to activate your account first.

1. Once you have been informed by your system administrator that an account was created for you, check your email's inbox. You should receive an email with instructions for activation.
2. Click the activation link within the email to activate your account.


Subject: PA-ATR3 - Account Activation
A new account at https://kitservices3.kithost.net/PAATR_Demo/ has been created for you.
Your new user name is: pmatthews
Click the link below (or copy and paste it into your browser's address bar) to activate your account.
If you did not request that this account be created on your behalf, contact KIT Support immediately.
https://kitservices3.kithost.net/PAATR_Demo/pActivate.aspx?lg=263cbe4b-23b1-48cc-8995-8776a2735722bf9db681-4039-40f7-b1d3-f263df3abd37
(This link will expire at: 01/17/2011 09:03:49 AM)
Activation link
you are unable to add the domain to your safe list, you may add PAATRAdmin@kitsolutions.net to your address book to help ensure successful delivery.

(This is a sample screenshot of the activation email)

3. Enter your password into the **Password** field. It must contain the following:
   a. Minimum 8 characters in length
   b. Must have 1 upper case character
   c. Must have 1 number
   d. Cannot use User ID as part of password
4. Retype the password in the **Confirm Password** field.
5. Enter your password question into the **Password Question** field.
6. Enter your password answer into the **Password Answer** field.
7. Click the OK (OK) button. You will now be taken to the Login Page.
   *Note: You will receive a confirmation email that your account has been activated.



(This is a screenshot of the Account Activation Screen)

Tips

 © KIT Solutions® 2011

- The activation link is only available for 72 hours. If you did not click the link in time, contact your system administrator to reset your password.
- If you used the Forgot Password feature, the Password Question and Password Answer will already be filled in for you based on your activation. You may change this information if desired.

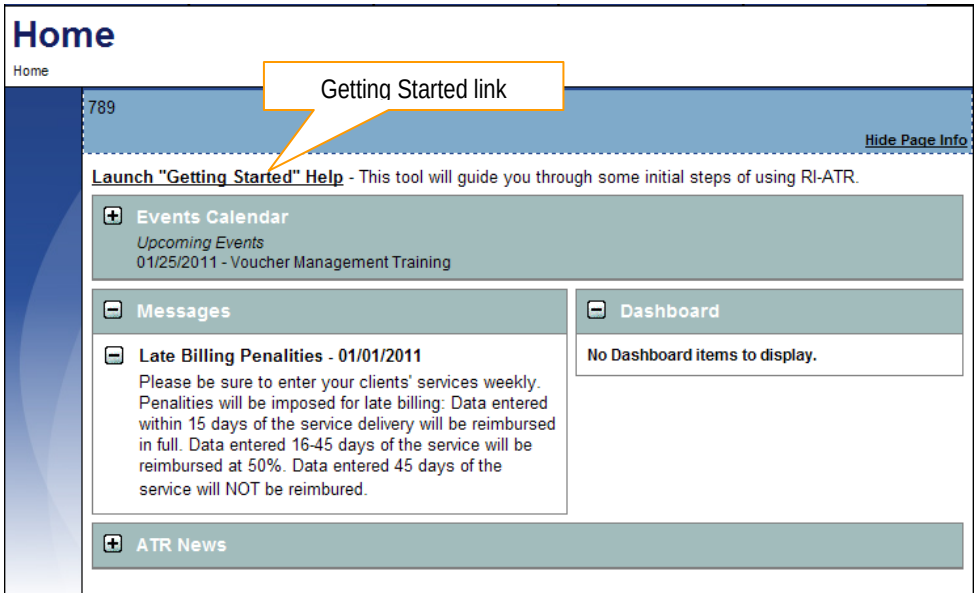
© KIT Solutions® 2011

HOME

The Home Page provides the organization with important messages, upcoming events and links to News regarding treatment.

Getting Started

- To view a guide through the initial steps of using the PA-ATR application, click on the Launch “Getting Started” Help link.
- A new window will open displaying some basic information about the ATR application.
- To close the window, click on the ☒ (X) in the upper right hand corner.

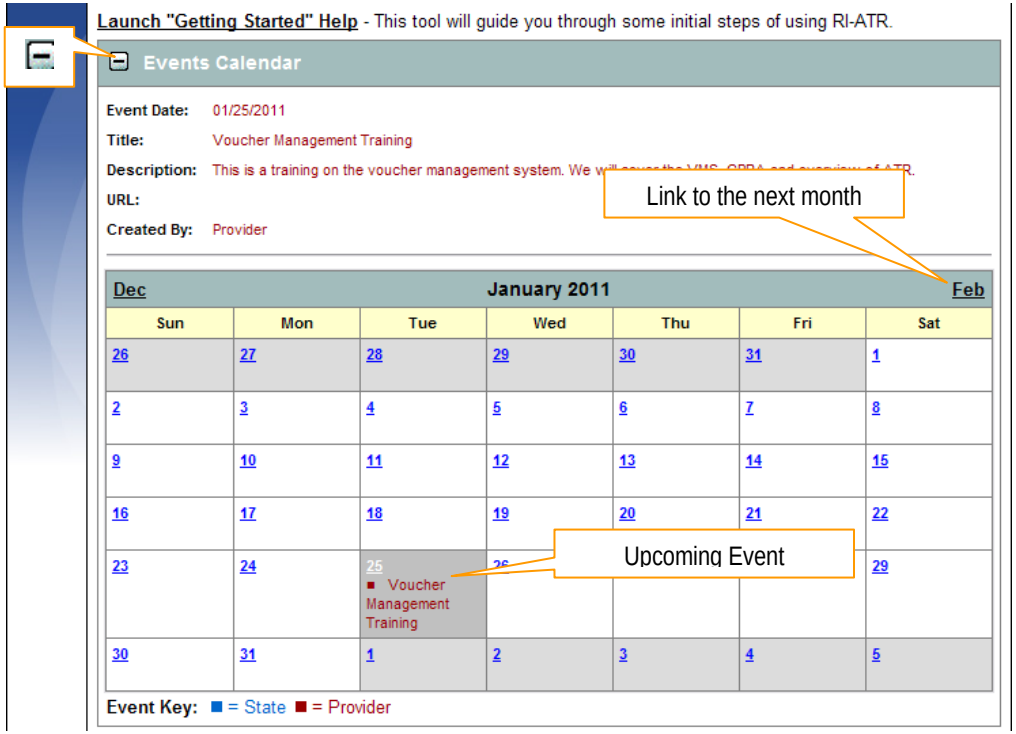

Home
Home
Getting Started link
789
Hide Page Info
Launch "Getting Started" Help - This tool will guide you through some initial steps of using RI-ATR.
Events Calendar
Upcoming Events
01/25/2011 - Voucher Management Training
Messages
Late Billing Penalities - 01/01/2011
Please be sure to enter your clients' services weekly. Penalities will be imposed for late billing: Data entered within 15 days of the service delivery will be reimbursed in full. Data entered 16-45 days of the service will be reimbursed at 50%. Data entered 45 days of the service will NOT be reimbured.
Dashboard
No Dashboard items to display.
ATR News

(This is a sample screenshot displaying the Home page)

© KIT Solutions® 2011

Events Calendar

- To view the events calendar, click on the ⊞ (plus sign) next to the Events Calendar.
- The Calendar will expand.
- To view Event details for a particular day, click on the calendar date (e.g., 25).
- Switch to the previous or next month by selecting the link located to the right or left of the current month's name.
- To close the calendar, click on the ⊟ (minus sign).
  *Note: To add events to the calendar, see the Manage Events section.


Launch "Getting Started" Help - This tool will guide you through some initial steps of using RI-ATR.
Events Calendar
Event Date: 01/25/2011
Title: Voucher Management Training
Description: This is a training on the voucher management system. We
URL:
Created By: Provider
Link to the next month
Dec
January 2011
Feb
Sun Mon Tue Wed Thu Fri Sat
26 27 28 29 30 31 1
2 3 4 5 6 7 8
9 10 11 12 13 14 15
16 17 18 19 20 21 22
23 24 25 Voucher Management Training 29
30 31 1 2 3 4 5
Upcoming Event
Event Key: ■ = State ■ = Provider

(This is a sample screenshot displaying the Events Calendar)

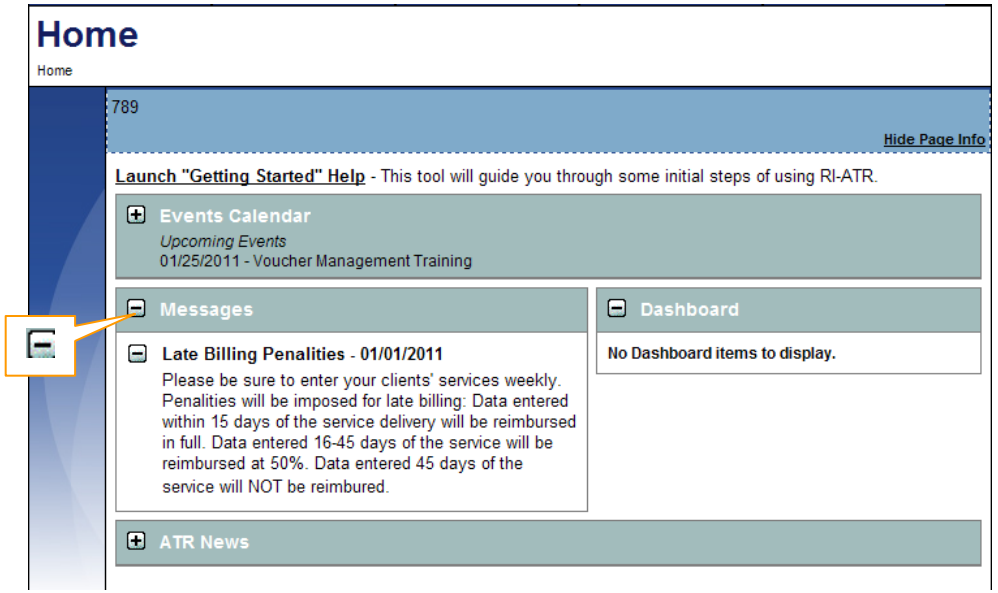
Tips

- If an event is added by the state, then the event will display for all providers, regardless of their permission level.

© KIT Solutions® 2011

Messages

- To view a Message description, click on the ⊞ (plus sign) next to the message title. The ⊞ (plus sign) will become a ⊟ (minus sign). To close the description, click on the ⊟ (minus sign).
  *Note: To add messages to the Home page, see the Manage Messages section.

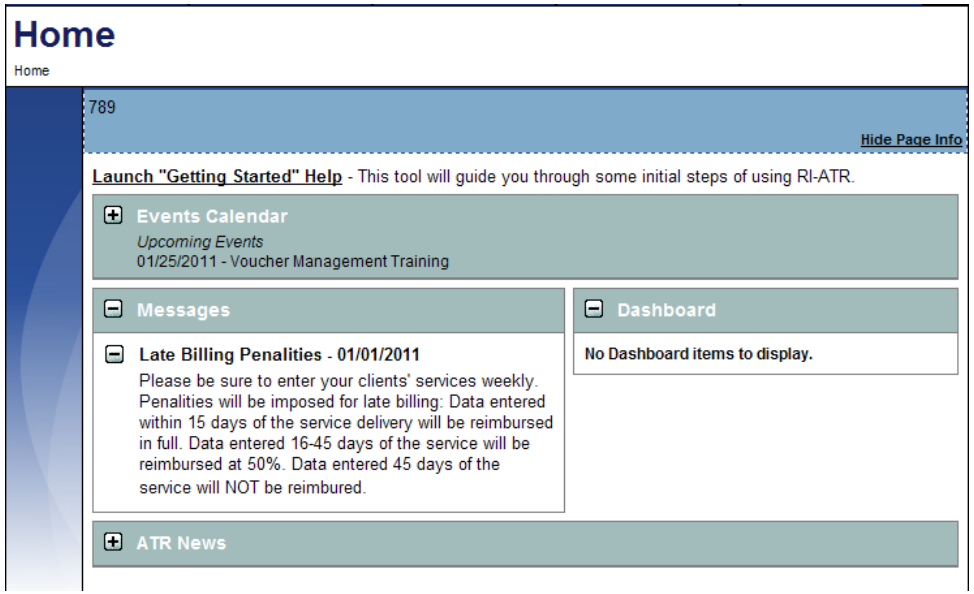

Home
Home
789
Hide Page Info
Launch "Getting Started" Help - This tool will guide you through some initial steps of using RI-ATR.
Events Calendar
Upcoming Events
01/25/2011 - Voucher Management Training
Messages
Late Billing Penalities - 01/01/2011
Please be sure to enter your clients' services weekly. Penalities will be imposed for late billing: Data entered within 15 days of the service delivery will be reimbursed in full. Data entered 16-45 days of the service will be reimbursed at 50%. Data entered 45 days of the service will NOT be reimbured.
Dashboard
No Dashboard items to display.
ATR News

(This is a sample screenshot of the Home Page displaying an open message.)

Dashboard

The Dashboard feature on the home page is designed to provide status updates in regards to various timeliness, notifications and inactivity scenarios for reports and surveys within the ATR Application.

- To view a list of dashboard reports, click on the ⊞ (plus sign) next to the Dashboard. The ⊞ (plus sign) will become a ⊟ (minus sign). To close the list of reports, click on the ⊟ (minus sign).


Home
Home
789
Hide Page Info
Launch "Getting Started" Help - This tool will guide you through some initial steps of using RI-ATR.
Events Calendar
Upcoming Events
01/25/2011 - Voucher Management Training
Messages
Late Billing Penalities - 01/01/2011
Please be sure to enter your clients' services weekly. Penalities will be imposed for late billing: Data entered within 15 days of the service delivery will be reimbursed in full. Data entered 16-45 days of the service will be reimbursed at 50%. Data entered 45 days of the service will NOT be reimbured.
Dashboard
No Dashboard items to display.
ATR News

(This is a sample screenshot of the Home page displaying the Dashboard.)

© KIT Solutions® 2011

Voucher Timeliness

This report shows all vouchers with no services within 20 days of being issued

1. Green=0-19 days
2. Yellow=20-30 days
3. Red=30+ days

GPRA Follow-Up Notification

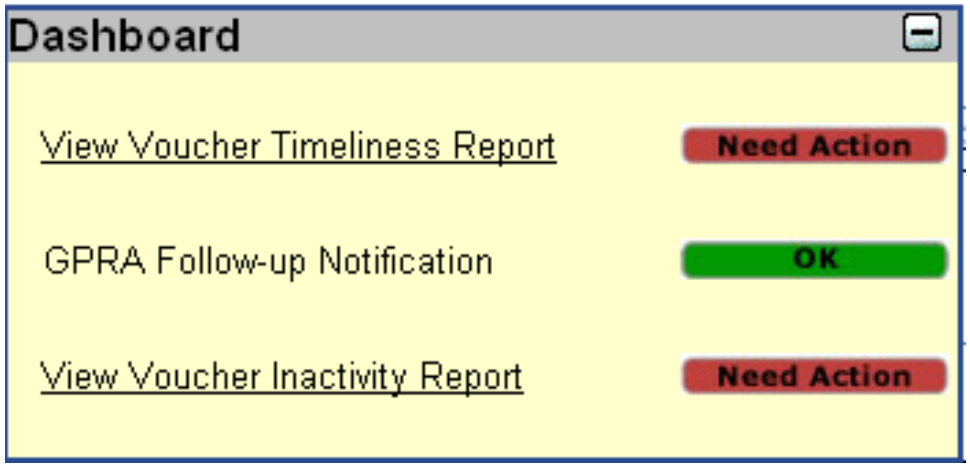
This report shows all vouchers that are 4.5 months (135 days) past voucher issue.

1. Green=0-134 days
2. Yellow=135-180 days
3. Red='181+ days

Voucher Inactivity

This report shows all vouchers that have no services for at least 20 days.

1. Green=0-19 days
2. Yellow=20-30 days
3. Red=30+ days



(This is a sample screenshot of the Dashboard notifications on the Home Page.)

Tips

- Green – No Action Needed
- Yellow – Alert. A link is available for the report or survey that falls within this status.
- Red – Action. A link is available for the report or survey that falls within this status.

© KIT Solutions® 2011

ATR News

- To view a list of News articles, click on the ⊞ (plus sign) next to the ATR News. The ⊞ (plus sign) will become a ⊟ (minus sign). To close the list of articles, click on the ⊟ (minus sign).
- To view a News article, click on the title of the article from the ATR News section. ATR News section is automatically updated in 'real-time' by JoinTogether.
- A new window will open when you click on the specified news article link.
- To close the window, click on the ☒ (X) in the upper right hand corner or click the Close (Close) link.

Messages
Late Billing Penalities - 01/01/2011
Dashboard
No Dashboard items to display.
ATR News
provided by: Jointogether
Study: AA Can Help Women Leaving Prison Cut Drinking
Youth Alcohol-Related ER Visits Spike on New Year's Day
SAMHSA: Changes, Regional Shifts in U.S. Treatment Admissions over Decade
Study Suggests Spirituality is Key to AA
Researchers: Alcohol a Risk Factor for Sudden Infant Death Syndrome (SIDS)?
U.S. to Crack Down on Web Drug Stores
'Healthy People 2020' Calls for State Medicaid Coverage of Smoking Cessation Tools
Average TV-Watching Teen Sees One Alcohol Ad a Day
Fla. County Wants to Finance Drug Treatment Through Alcohol Tax
Study: Lowering Drinking Age Would Not Reduce On-Campus Bingeing
Buprenorphine During Pregnancy Better than Methadone for Reducing Newborn's Opiate Withdrawal Symptoms
National Transportation Safety Board Goes After 'Hard-Core' Drunk Drivers
'Alcoholic' Stigma Keeps Many Problem Drinkers From Seeking Treatment
N.J. Reaches Deal Allowing Medical Marijuana Sales
One in Three Killed Drivers Tested Positive for Drugs
Article link
You are viewing the news feed which can cause slower page performance. Click here to disable the news feed.

(This is a sample screenshot of the Home page displaying the ATR News links)

Tips

- If no news articles appear when click the ⊞ (plus sign), click the link located at the bottom of the page to enable the news feed.

  You are NOT viewing the news feed which results in better page performance. Click **here** to re-enable the news feed.

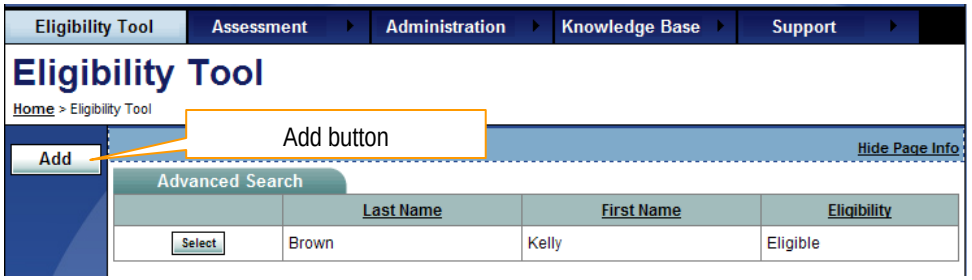
© KIT Solutions® 2011

ELIGIBILITY TOOL

The Eligibility Tool module is designed to create a client profile and determine their eligibility for treatment.

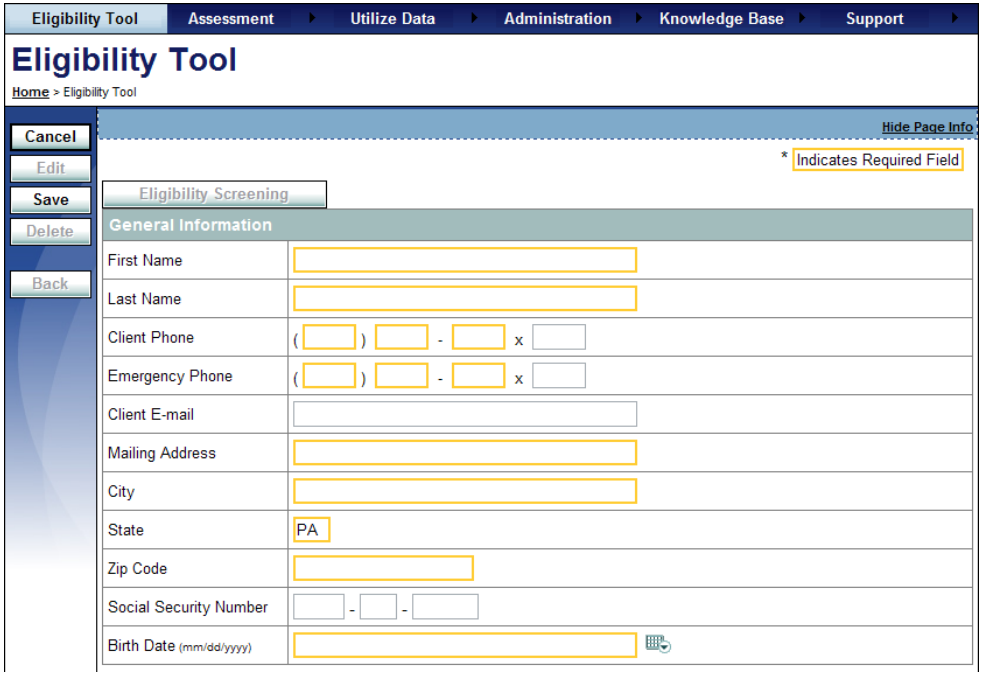
Adding a Client

1. Click **Eligibility Tool** from the Menu.
2. Click the Add (**Add**) button.



(This is a sample screenshot of the Eligibility Tool Listing Page.)

3. Enter the client's first name in the **First Name** field.
4. Enter the client's last name in the **Last Name** field.
5. Enter the client's telephone number in the **Client Phone** fields.
   *Note: The Phone must be filled out in three fields. The fourth field is optional for an extension number.
6. Enter the client's emergency telephone number in the **Emergency Phone** field.
   *Note: The Emergency Phone must be filled out in three fields. The fourth field is optional for an extension number.
7. Enter the client's email address in the **Client E-mail** field. This is an optional field.
8. Enter the client's address in the **Mailing Address** field.
9. Enter the client's city in the **City** field.
10. The **State** field is defaulted to CA.
11. Enter the client's 5 digit zip code in the **Zip Code** fields.
12. Enter client's social security number in the **Social Security Number** field. This is an optional field.
13. Enter the client's date of birth in the **Birth Date*** field as mmddyyyy or select the date by clicking on the calendar . (See Calendar section for further details)
14. Click the Save (**Save**) button from the left toolbar.
    *Note: To exit the screen without saving any details, click the Cancel (**Cancel**) button.
15. Click the Back (**Back**) button to return to the Listing page.

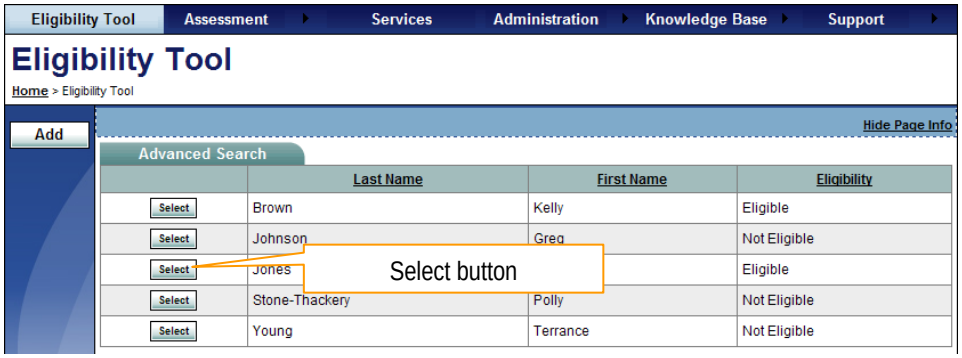


(This is a sample screenshot of the Eligibility Tool edit form.)

© KIT Solutions® 2011

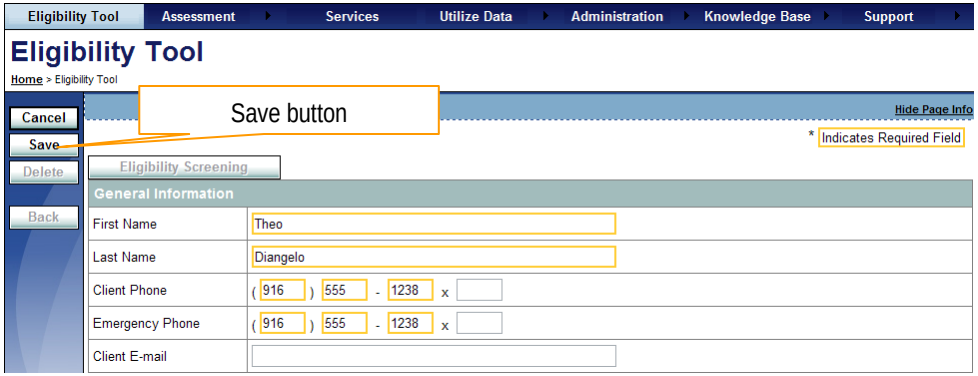
Editing a Client

1. Click **Assessment** from the Menu.
2. Select the client you wish to edit by clicking the Select (**Select**) button to the left of the client's name.



(This is a sample screenshot of the Eligibility Tool Listing Page.)

3. Click the Edit (**Edit**) button from the left toolbar.
4. The client will appear in the edit mode.
5. Make any changes needed to the details.
6. Click the Save (**Save**) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (**Cancel**) button.
7. Click the Back (**Back**) button to return to the Listing page.

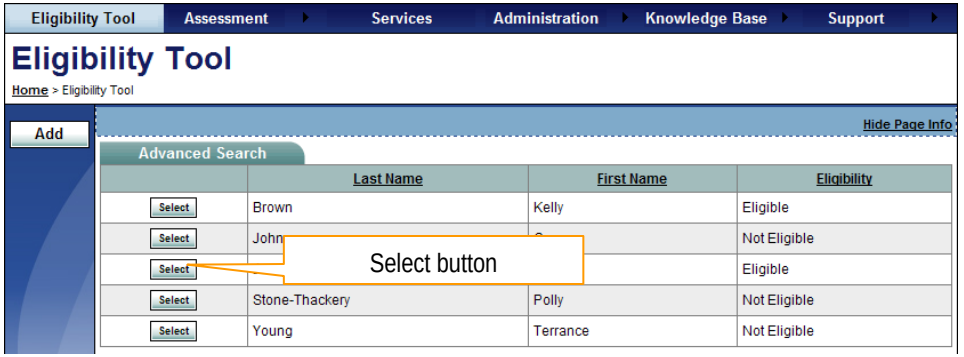


(This is a sample screenshot of the Eligibility Tool edit form.)

© KIT Solutions® 2011

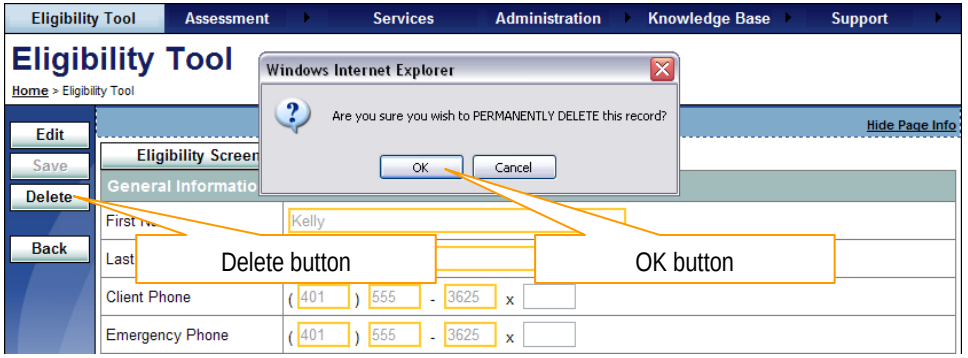
Deleting a Client

1. Click **Assessment** from the Menu.
2. Select the client you wish to delete by clicking the Select (**Select**) button to the left of the client's name.



(This is a sample screenshot of the Eligibility Tool Listing Page.)

3. Click the Delete (**Delete**) button from the left toolbar.
4. You will receive a message asking if you are sure. Click the OK (**OK**) button to continue deleting the client.
   *Note: To cancel the deletion, click the Cancel (**Cancel**) button.
5. Click the Back (**Back**) button to return to the Listing page.



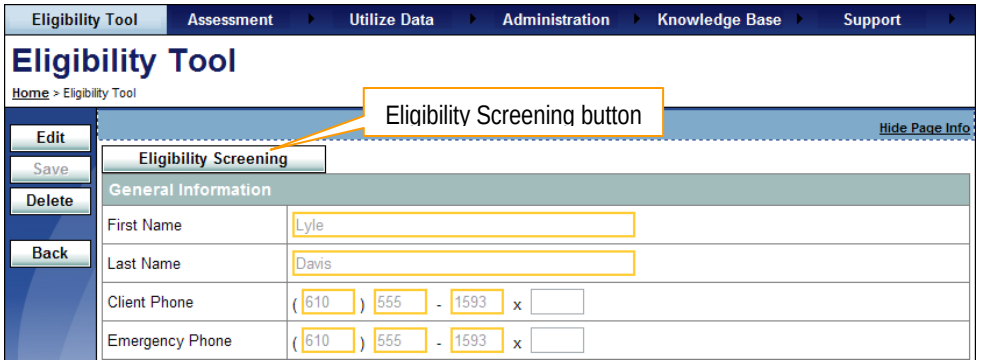
(This is a sample screenshot of the Eligibility Tool edit form.)

© KIT Solutions® 2011

Eligibility Screening

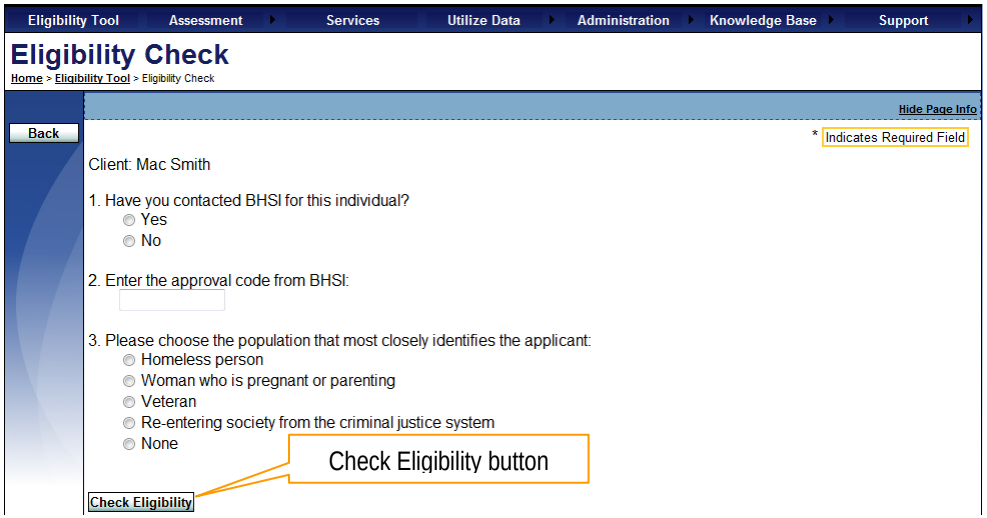
Once a client profile has been saved, the Eligibility Screening (**Eligibility Screening**) button will become available to check the client's eligibility for treatment.

1. From the Eligibility Tool Edit form, click the Eligibility Screening (**Eligibility Screening**) button.



(This is a sample screenshot of the Eligibility Tool Edit Form.)

2. Answer each of the questions that appear.
3. Click the Check Eligibility (**Check Eligibility**) button at the bottom of the page.
4. Click the Back (**Back**) button to return to the Eligibility Tool edit form.



(Partial screenshot of the Eligibility Check Edit Form.)

Tips

- The client will be considered eligible for treatment based on BHSI approval and the applicant's population category.

© KIT Solutions® 2011

ASSESSMENT

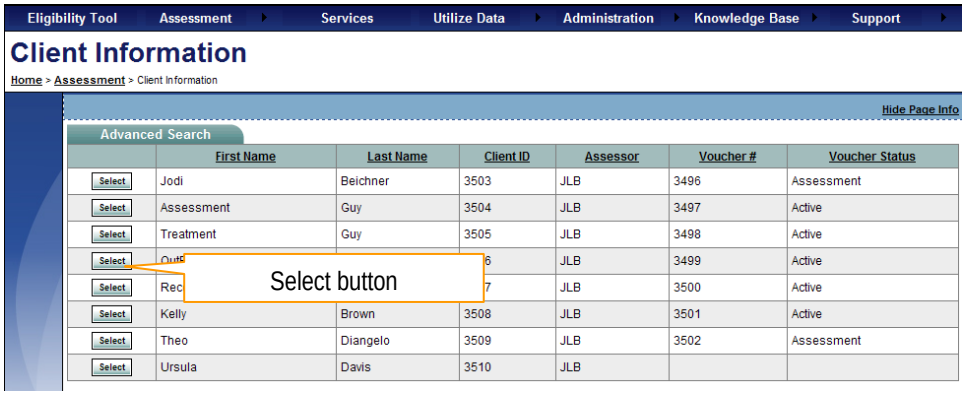
The Assessment module is designed to register and track client information within the application.

Client Information

Use the Client Information form to add/edit and delete information for clients within the application

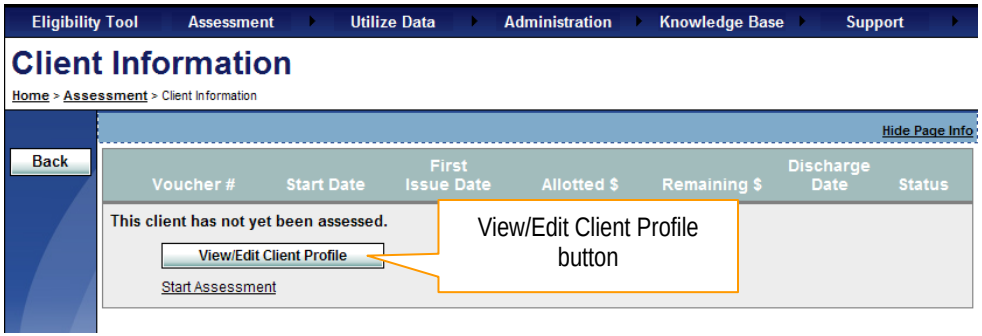
Updating Client Information

1. Click **Assessment** from the Menu.
2. Click **Client Information** from the Assessment Landing Page.
3. Click the Select (**Select**) button to the left of the appropriate client.



(This is a sample screenshot of the Client Information Listing Page.)

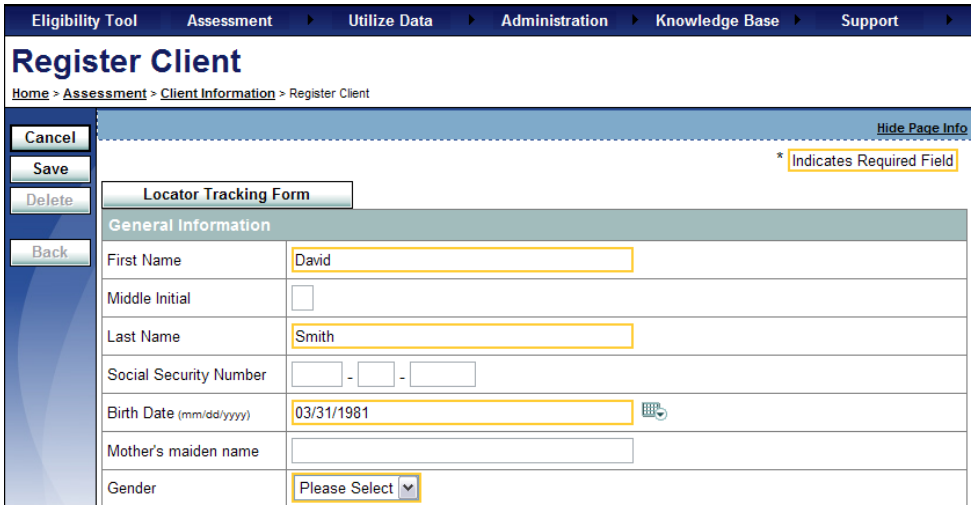
4. Click the View/Edit Client Profile (**View/Edit Client Profile**) button.



(This is a sample screenshot of the Voucher Information Listing Page.)

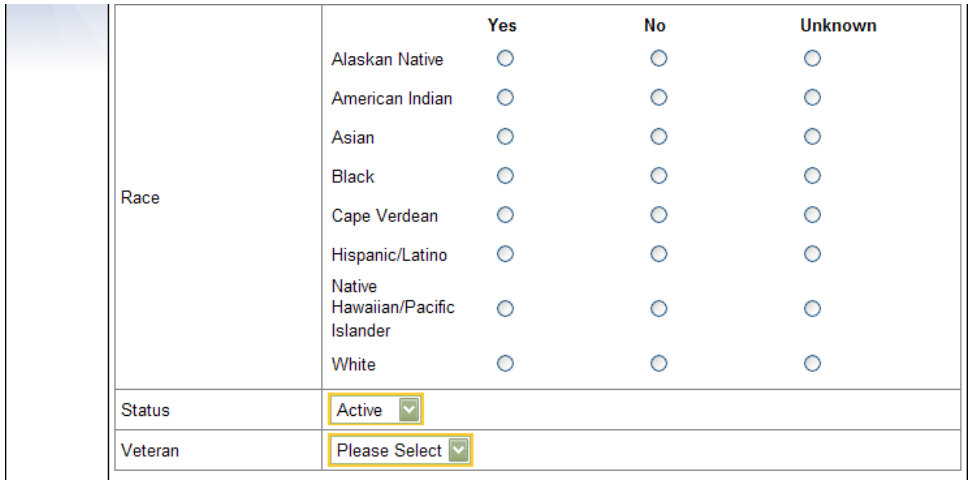
© KIT Solutions® 2011

5. Click the Edit (Edit) button from the left toolbar.
6. Some fields will be filled in for you based on the client profile entered in the Eligibility Tool.
7. Update the client's General Information.
    a. Enter the client's first name in the First Name* field.
    b. If desired, enter the client's middle initial in the Middle Initial field.
    c. Enter the client's last name in the Last Name* field.
    d. Enter the client's social security number in the Social Security Number* field.
    e. Enter the client's date of birth in the Birth Date* field as mmddyyyy or select the date by clicking on the calendar . (See Calendar section for further details)
    f. If known, enter the client's Mother's maiden name in the Mother's maiden name field.
    g. Select the client's Gender* using the dropdown list.



(This is a sample screenshot of the Register Client edit form.)

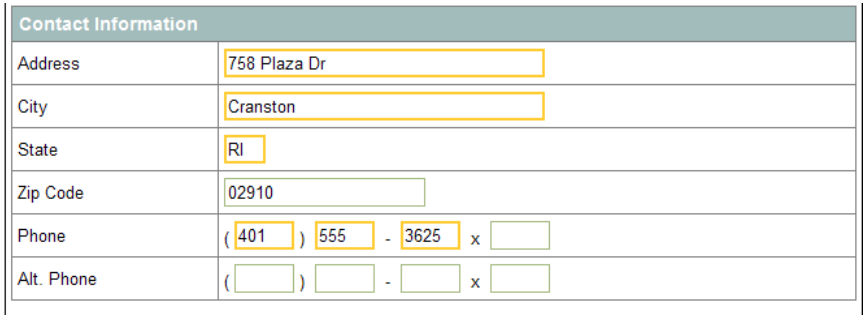
    h. Select the client's race using the Race* radio buttons.
    i. The Status* is defaulted to *Active*.
        i. *Active*: the client is currently receiving treatment (can be viewed on other screens and reports).
        ii. *Inactive*: the client is no longer receiving treatment (will no longer appear on other screens and reports).
    j. Select the client's veteran status from the Veteran dropdown list.
    *Note: If *Yes* is selected, new fields will appear.
        i. Select the branch of the service the client is/was in from the Branch of Service dropdown list.
        ii. Select the discharge status of the client from the Discharge Status dropdown list.



(This is a screenshot of the Register Client edit form.)

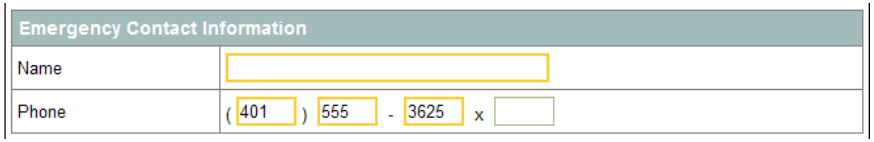
© KIT Solutions® 2011

8. Update the client's **Contact Information**.
    a. Enter the client's address in the **Address*** field.
    b. Enter the client's city in the **City*** field.
    c. The **State*** field is defaulted to RI.
    d. Enter the client's 5 digit zip code in the **Zip Code*** fields.
    Note: Enter the Zip Code extension in the second box for the Zip Code field, only the 5 digits are required.
    e. Enter the clients area code and extension in the **Phone*** field.
    f. If desired, enter and alternative phone number in the **Alt. Phone** fields.



(This is a sample screenshot of the Register Client Contact Information fields.)

9. Update the client's **Emergency Contact Information**.
    a. Enter the client's emergency contact name in the **Name*** field.
    b. Enter the client's emergency area code and extension in the **Phone*** field.
10. Click the Save (**Save**) button from the left toolbar.
    *Note: To exit the screen without saving any details, click the Cancel (**Cancel**) button.
11. Click the Back (**Back**) button to return to the Listing page.



(This is a sample screenshot of the Register Client Emergency Contact information fields.)

Tips

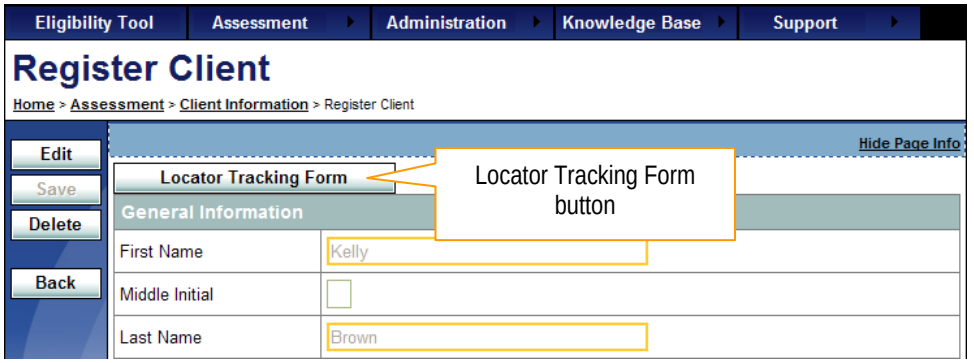
- Once the Client Information has been updated, the client will receive a voucher number.

© KIT Solutions® 2011

Locator Tracking Form

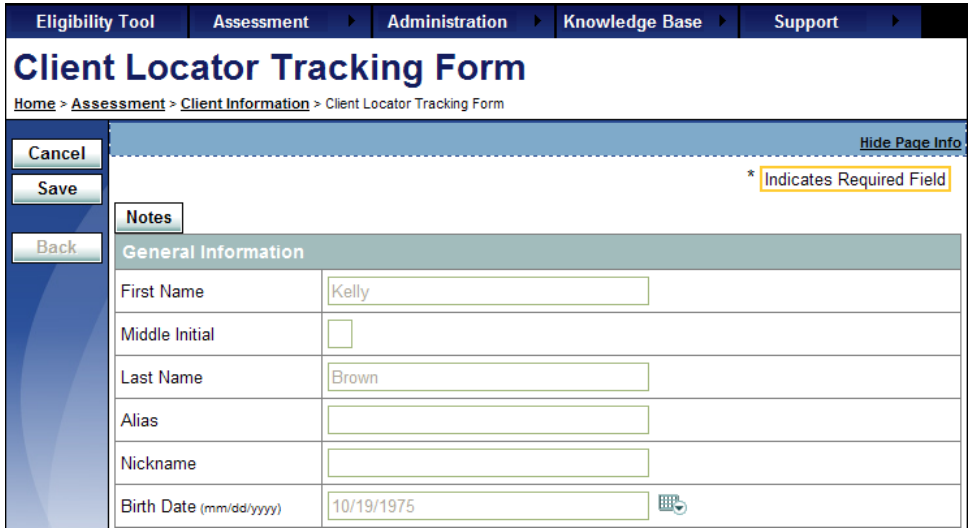
The Locator Tracking Form is used to gather further information about a client. This form is not required, but highly suggested so the client can be found for their 6 month follow-up.

1. From the Register Client edit form, click the Locator Tracking Form (**Locator Tracking Form**) button.



(This is a sample screenshot of the Register Client edit Form)

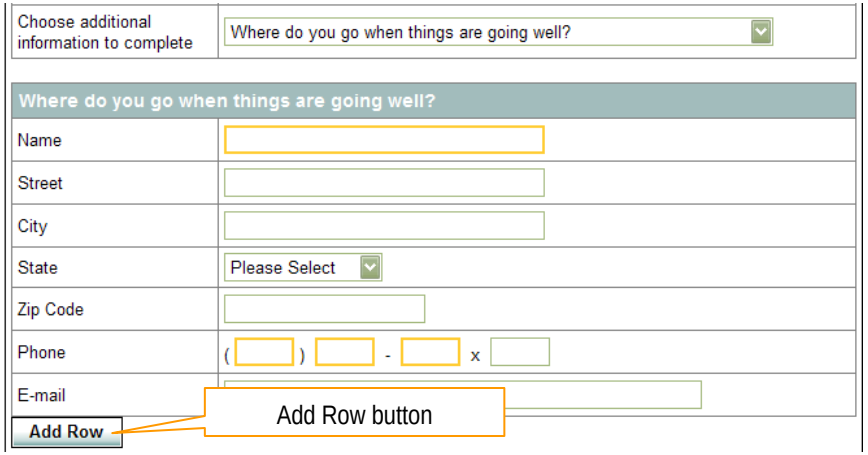
2. Click the Edit (**Edit**) button from the left toolbar.
3. The required fields (i.e. **First Name**, **Last Name**, **Birth Date** and **Social Security Number**) are automatically filled in with the information that was entered in the Register Client screen.
4. Enter in additional information in the optional fields.



(This is a sample screenshot of the Locator Tracking Form)

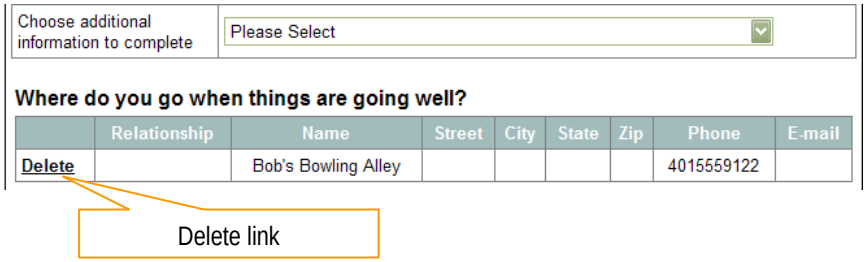
© KIT Solutions® 2008

5. The **Choose additional information to complete** dropdown list allows you to answer multiple different questions pertinent to the client.
    a. Select a question from the **Choose additional information to complete** dropdown list. New fields will appear.
    b. Fill in the required fields and any optional fields you desire.
    c. Click the Add Row (**Add Row**) button.



(This is a sample screenshot of the Locator Tracking Form.)

    d. A grid will appear displaying the question and answers. To delete the record, click the **Delete** link.
    e. Repeat steps a-c for each question you wish to add for the client.
6. Click the Save (**Save**) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (**Cancel**) button.
7. Click the Back (**Back**) button to return to the Register Client edit form.



(This is a sample screenshot of the Locator Tracking Form.)

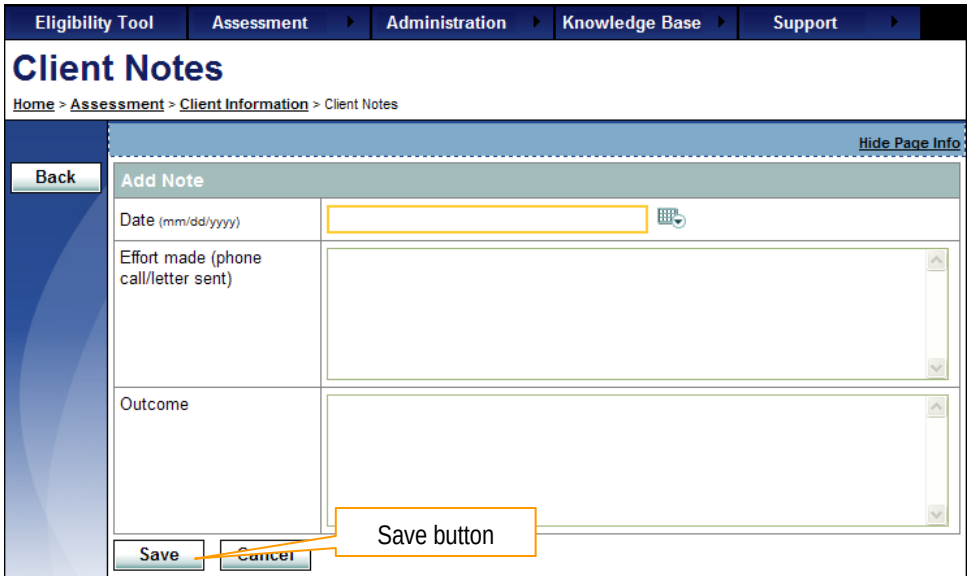
Tips

- All required fields are defaulted from the Register Client Page.

© KIT Solutions® 2011

Tracking Form Notes

1. Click the Notes (Notes) button from the top of the Client Locator Tracking Form Edit form.
2. Click the Add (Add) button.
3. Enter the Date* as mmddyyyy or select the date by clicking on the calendar . (See Calendar section for further details)
4. Enter notes into the Effort Made field.
5. Enter notes into the Outcome field.
6. Click the Save (Save) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (Cancel) button.
7. To remove a record, click the Delete (Delete) button.
8. Click the Back (Back) button to return to the Locator Tracking form edit form.



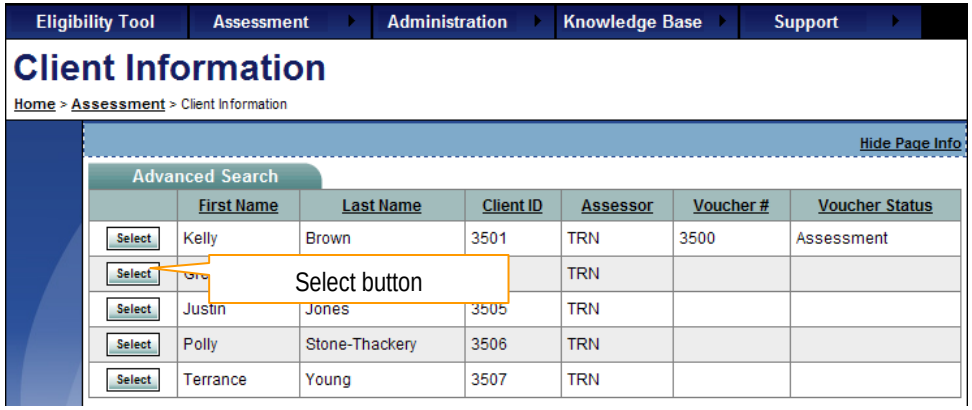
(This is a sample screenshot of the Client Locator Tracking Form Notes page.)

© KIT Solutions® 2011

Voucher Information

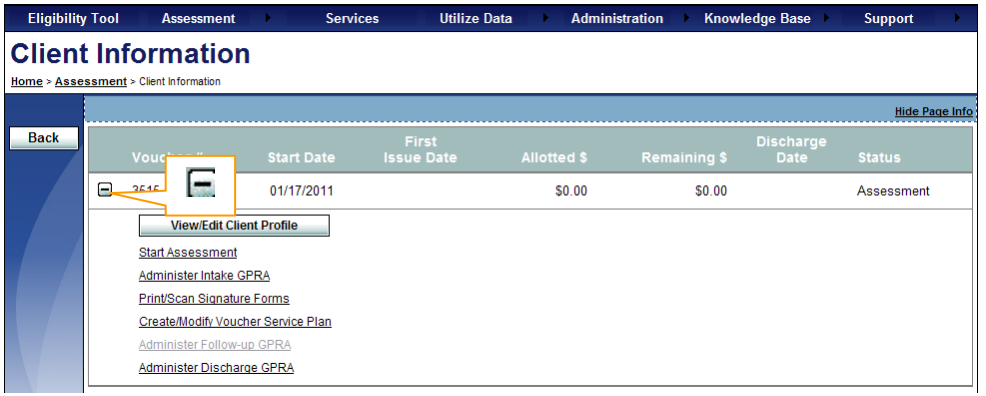
The Voucher Information module is designed to enter forms and information related to each client within the application.

1. Click **Assessment** from the Menu.
2. Click **Client Information** from the Assessment Landing Page.
3. Click the Select (**Select**) button to the left of the appropriate client.



(This is a sample screenshot of the Client Information Listing Page.)

4. The screen is defaulted to open with the ⊟ (**minus sign**) to the left of the Voucher #, which has the Voucher Information expanded.
5. To continue with entering the client's voucher information, you will need to click on the links (e.g. Start Assessment) to enter the necessary client data.
   *Note: Click on the ⊟ (Minus sign), it becomes a ⊞ (Plus sign) with the links no longer displaying. To make the links available click on the⊞ (Plus sign).
6. Click the Back (**Back**) button to return to the Listing page.



(This is a partial screenshot of Voucher Information Listing Page.)

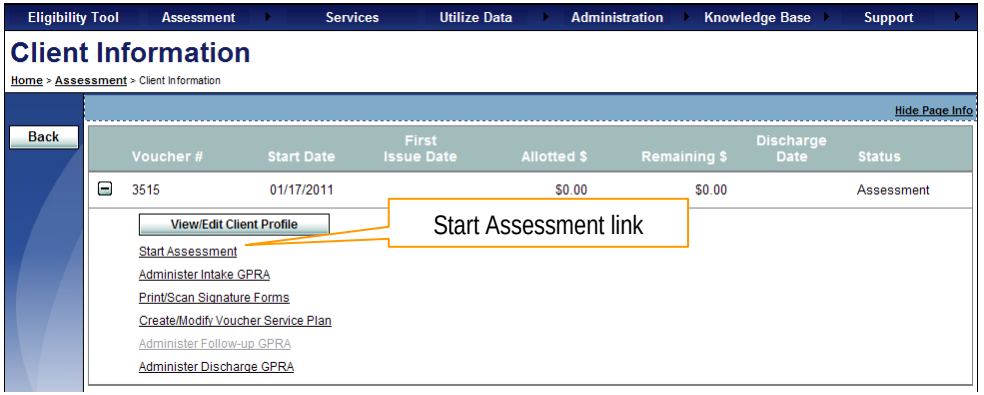
Tips

- The links on the Voucher Information page (e.g. Start Assessment, Administer Intake GPRA, Print/Scan Signature Forms) are linked to the client.

© KIT Solutions® 2011

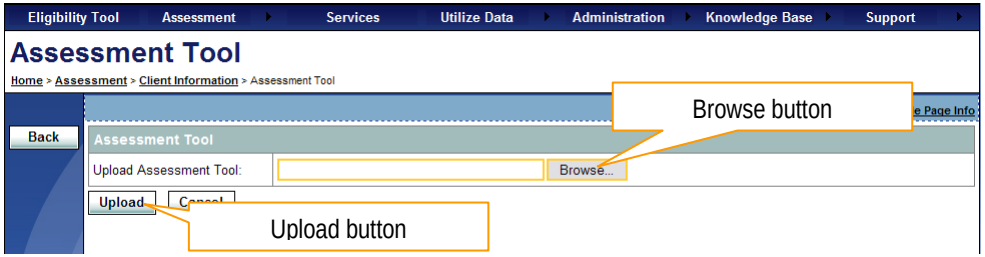
Start Assessment

1. From the Client Information page, click the **Start Assessment** link.



(This is a sample screenshot of the Voucher Information Listing Page.)

2. Click the Add (**Add**) button from the left toolbar.
3. Click Browse... (**Browse**) button to browse your computer for the document.
    a. After clicking the Browse... (**Browse**) button, the Choose Files window opens displaying your files. Select the file, then click the **Open** button.
4. Click the Upload (**Upload**) button.
5. Click the Back (**Back**) button to return to the Listing page.



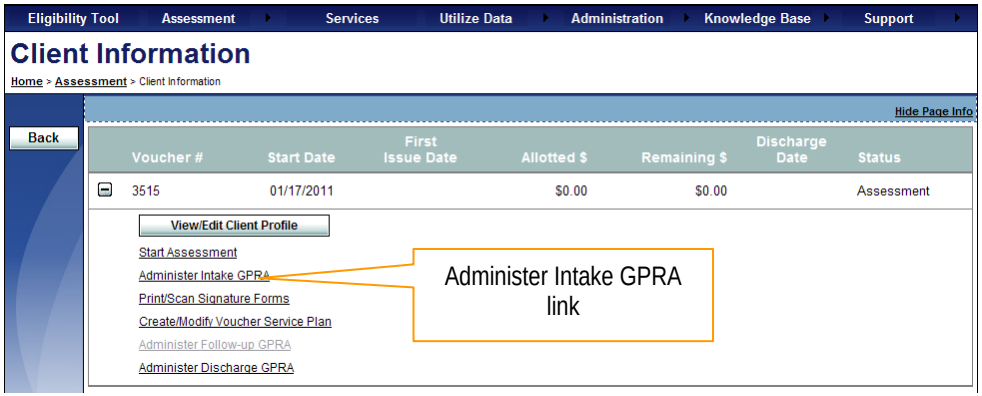
(This is a sample screenshot of the Upload Assessment Tool edit form.)

© KIT Solutions® 2011

Administer Intake GPRA

The Administer Intake GPRA is used to gather further information about a client.

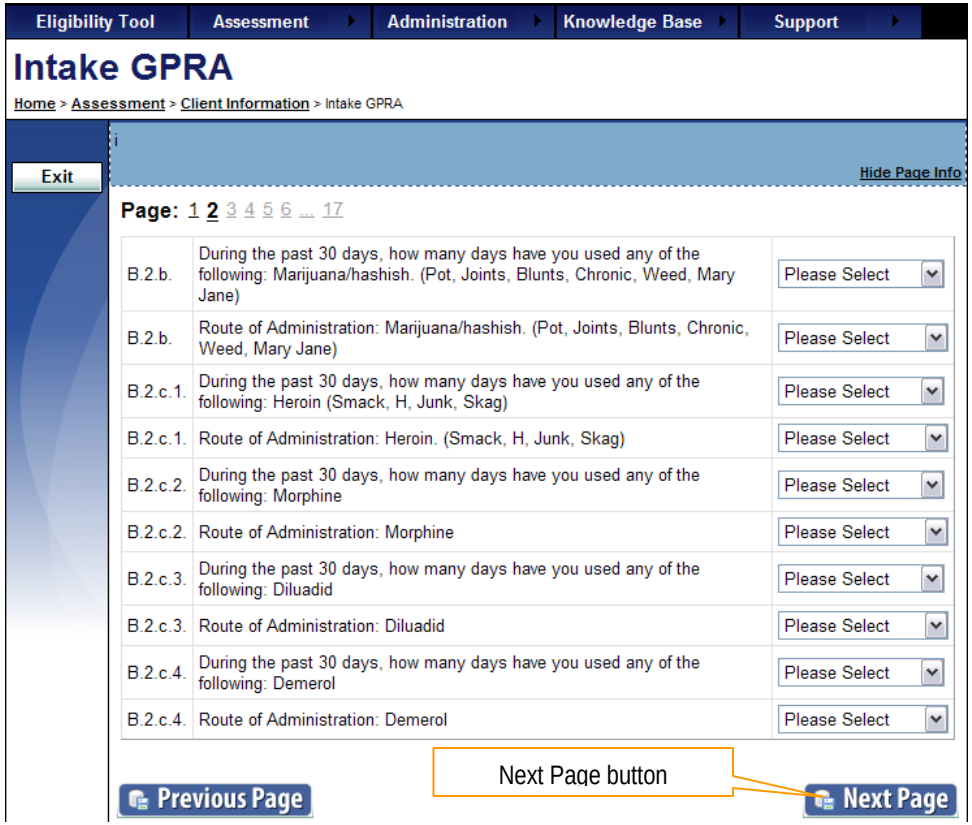
1. From the Client Information page, click the **Administer Intake GPRA** link.



(This is a sample screenshot of the Voucher Information Listing Page.)

© KIT Solutions® 2011

2. Answer questions using the drop down list to the right of the question.
3. Click the Next Page (Next Page) button to continue to the next page of questions or click the Previous Page (Previous Page) button to return to the previous page. (See table).
4. Continue in this manner until all the pages have been filled in.
5. Once you have answered all the questions, click the Finish (Finish) button.
6. Click the Exit (Exit) button to return to the Client Information Listing page.


Eligibility Tool
Assessment
Administration
Knowledge Base
Support
Intake GPRA
Home > Assessment > Client Information > Intake GPRA
Exit
Hide Page Info
Page: 1 2 3 4 5 6 ... 17
B.2.b. During the past 30 days, how many days have you used any of the following: Marijuana/hashish. (Pot, Joints, Blunts, Chronic, Weed, Mary Jane)
B.2.b. Route of Administration: Marijuana/hashish. (Pot, Joints, Blunts, Chronic, Weed, Mary Jane)
B.2.c.1. During the past 30 days, how many days have you used any of the following: Heroin (Smack, H, Junk, Skag)
B.2.c.1. Route of Administration: Heroin. (Smack, H, Junk, Skag)
B.2.c.2. During the past 30 days, how many days have you used any of the following: Morphine
B.2.c.2. Route of Administration: Morphine
B.2.c.3. During the past 30 days, how many days have you used any of the following: Diluadid
B.2.c.3. Route of Administration: Diluadid
B.2.c.4. During the past 30 days, how many days have you used any of the following: Demerol
B.2.c.4. Route of Administration: Demerol
Please Select
Next Page button
Previous Page
Next Page

(This is a screenshot of the Intake GPRA Survey.)

Below are the buttons that allow you to move within the GPRA Surveys.

Next Page	This button moves you to the page directly after the one currently on
Previous Page	This button moves you to the page directly prior to the one currently on.

Tips

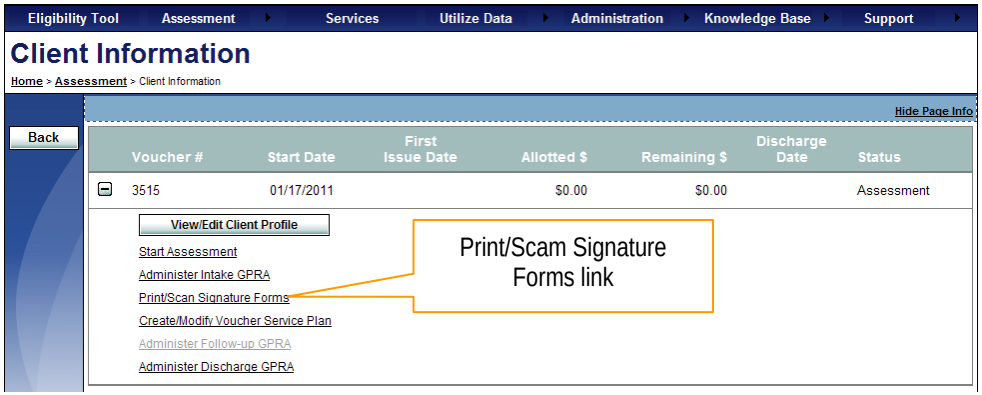
- Clicking on the Next Page (Next Page) button will automatically save the current page.

© KIT Solutions® 2011

Print/Scan Signature Forms

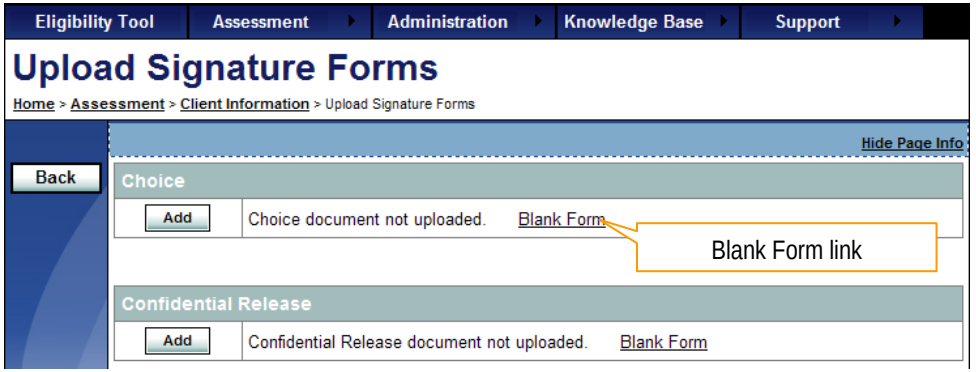
The Print/Scan Signature Forms are the Choice and Confidential Release Forms which grant permission to client information.

1. From the Client Information page, click the **Print/Scan Signature Forms** link.



(This is a sample screenshot of the Voucher Information Listing Page.)

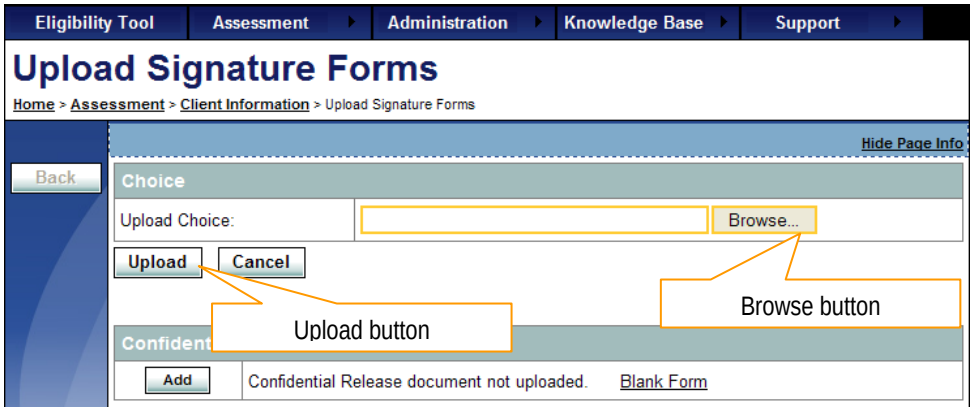
2. To download a Blank Form, click on the Blank Form link located to the right of the desired form.
3. A new window will open in a PDF File format.
   a. Click the (Save) button to save a copy to your computer. This must be done in order to use the digital signature.
   b. To digitally sign the form, click on the (Sign) button in the Adobe Reader submenu.
   c. Click (Place Signature) and you will need to drag your mouse to draw the area where signature needs to appear.
   d. A new window will open and ask you to type in a password and to select the Appearance of the signature using radio buttons.
   e. Click the **Sign** button.
4. Once you have signed and dated the form in the designated areas, save the form.
5. To close the window, click the (X) in the upper right corner.



(This is a screenshot of the Upload Signature Form Page.)

© KIT Solutions® 2011

6. To upload the signed Form, click the Add (Add) button.
7. Click Browse... (Browse) button to browse your computer for the signed document.
    a. After clicking the Browse... (Browse) button, the Choose Files window opens displaying your files. Select the file, then click the Open button.
8. Click the Upload (Upload) button.
9. Click the Back (Back) button to return to the Listing page.



(This is a screenshot of the Upload Signature Form Page.)

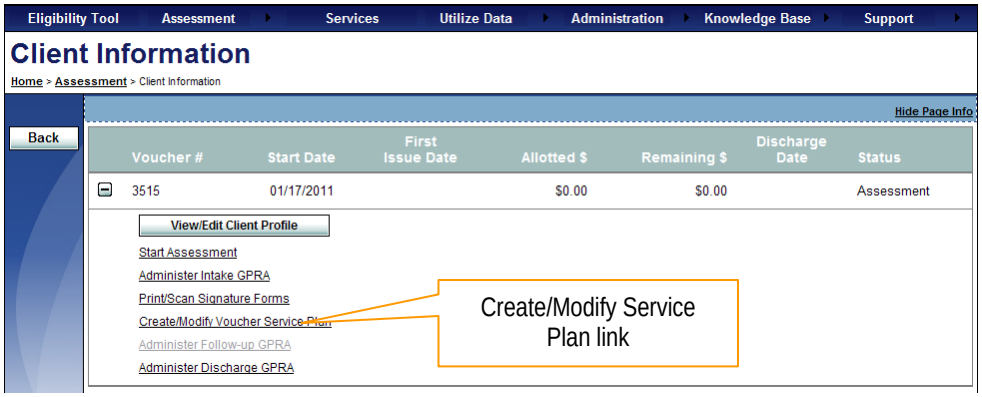
Tips

- If you have a pop-up blocker on your computer, hold the ctrl key down while selecting any button used to view the forms (e.g., Confidential Release Forms, PDF, etc.).

© KIT Solutions® 2011

Create/Modify Voucher Service Plan

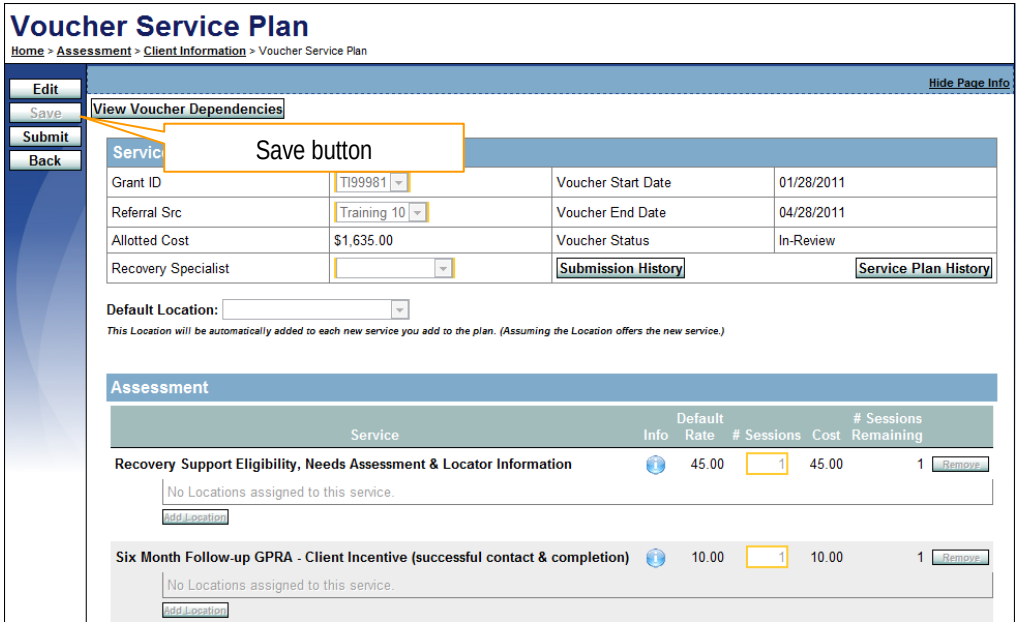
1. From the Client Information page, click the **Create/Modify Voucher Service Plan** link.



(This is a sample screenshot of the Voucher Information Listing Page.)

2. Click the Edit (**Edit**) button from the left toolbar.
3. Select the Recovery Specialist for the client from the **Recovery Specialist** dropdown list.

   *Note: The Recovery Specialist dropdown list populates based on the staff members that were checked as Recovery Specialist in the Staff module.
4. Select the services the client is to receive from the **Add Service** dropdown lists for each section that is relevant to the client.
   a. Click the Add (**Add**) button.
5. Enter in the number of sessions the client is planned to receive in the # **Sessions** field.
6. Click the Add PID (**Add Location**) button.
   a. A new window will open displaying the program location information. Click the Select (**Select**) button to the left of the provider that will be providing the service.
   b. Click the Add to Plan (**Add to Plan**) button.
7. If you wish to add any notes or comments to the Service Plan, click the Add (**Add**) button in the Comments section.



(This is a partial screenshot of the Voucher Service Plan Page.)

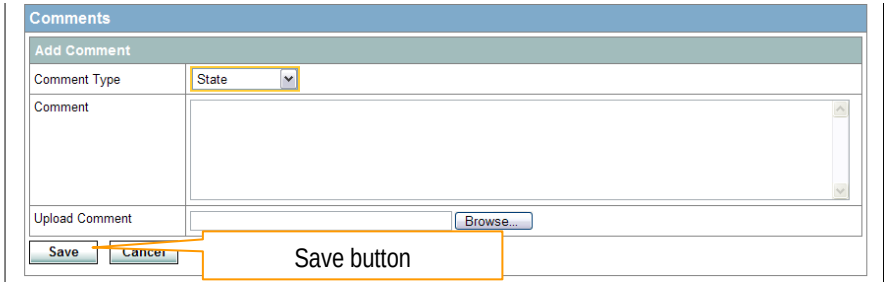
© KIT Solutions® 2011

a. The **Comment Type** will be defaulted to ***Provider***.
b. Enter a brief description of your note or comment in the **Comment** field.
c. If you would like to upload a document pertinent to the client's service plan, click the Browse... (**Browse**) button.
    i. After clicking the Browse... (**Browse**) button, the Choose Files window opens displaying your files. Select the file, then click the **Open** button.
d. Click the Save (**Save**) button.

*Note: To cancel the comment, click the Cancel (**Cancel**) button.

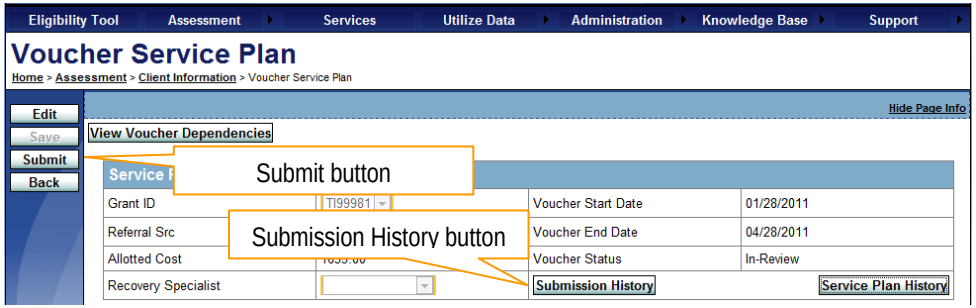
8. Click the Save (**Save**) button from the left toolbar.

*Note: To exit the screen without saving any changes, click the Cancel (**Cancel**) button.



(This is a partial screenshot of the Voucher Service Plan Page.)

9. If you are ready to submit the Service Plan for review, click the Submit (**Submit**) button.
    a. To view previous submissions of the Voucher Service Plan you currently have open, click the Submission History (**Submission History**) button.
    b. A new window will open showing previous submissions.
    c. To close the window, click on the ☒ (X) in the upper right hand corner.
10. Click the OK (**OK**) button. If there are errors you will need to click the View Voucher Dependencies (**View Voucher Dependencies**) button.
11. Click the Back (**Back**) button to return to the Listing page.



(This is a partial screenshot of the Voucher Service Plan Page.)

Tips

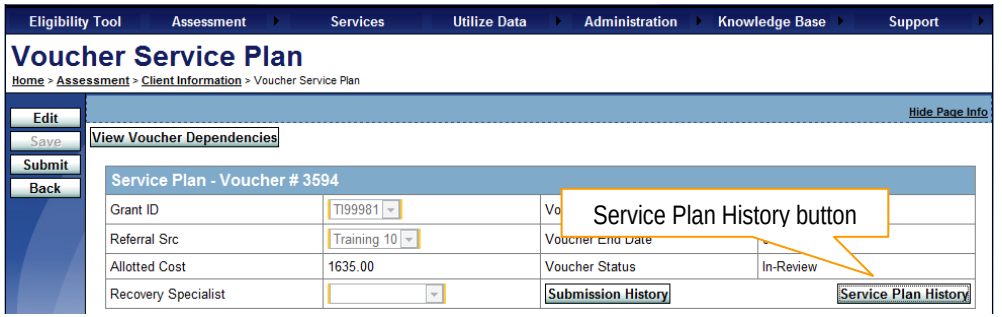
- If a client has been inactive for 6 months after the First Issue date (no services have been entered) then their status on the Client Registration page will be updated to Inactive. If an attempt is made to edit the status then they will receive the following message: "This client has been inactive for 6 or more months; therefore funded ATR services can no longer be received."
- Once a service plan has been submitted, an email will be triggered to the Recovery Specialist informing him/her of the services associated with the client.
- To automatically add a location to a newly added service, choose a location from the **Default Location** dropdown. When you add a new service, this location will be added for you. This only applies to when a new service is added and will not affect any services already entered.

© KIT Solutions® 2011

View Service Plan History

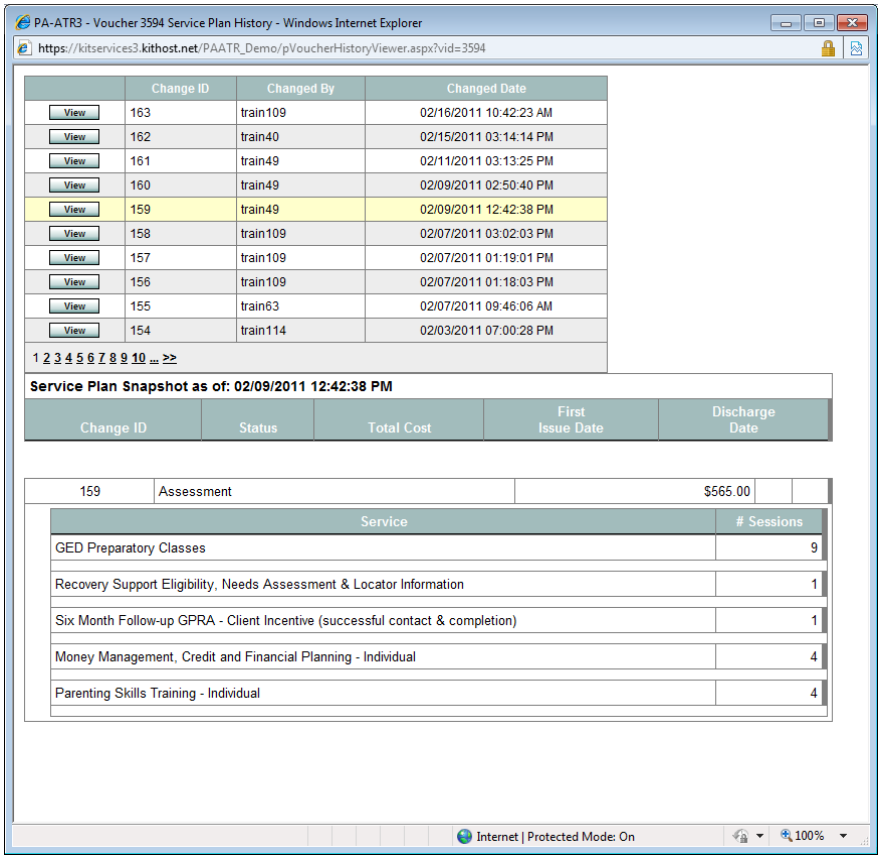
To view the history of the service plan, perform the following steps:

1. Click the Service Plan History (Service Plan History) button.
2. A new window will open showing a history of changes made, who made the changes, and when they were made.



(This is a partial screenshot of the Voucher Service Plan Page.)

3. To view a specific change, click the View (View) button next to the appropriate Change ID.
4. The window will show a snapshot of what was changed in the service plan.
5. To close the window, click on the X (X) in the upper right hand corner.


PA-ATR3 - Voucher 3594 Service Plan History - Windows Internet Explorer
https://kitservices3.kithost.net/PAATR_Demo/pVoucherHistoryViewer.aspx?vid=3594
Change ID
Changed By
Changed Date
163 train109 02/16/2011 10:42:23 AM
162 train40 02/15/2011 03:14:14 PM
161 train49 02/11/2011 03:13:25 PM
160 train49 02/09/2011 02:50:40 PM
159 train49 02/09/2011 12:42:38 PM
158 train109 02/07/2011 03:02:03 PM
157 train109 02/07/2011 01:19:01 PM
156 train109 02/07/2011 01:18:03 PM
155 train63 02/07/2011 09:46:06 AM
154 train114 02/03/2011 07:00:28 PM
1 2 3 4 5 6 7 8 9 10 ... >>
Service Plan Snapshot as of: 02/09/2011 12:42:38 PM
Change ID
Status
Total Cost
First Issue Date
Discharge Date
159 Assessment $565.00
Service
Sessions
GED Preparatory Classes 9
Recovery Support Eligibility, Needs Assessment & Locator Information 1
Six Month Follow-up GPRA - Client Incentive (successful contact & completion) 1
Money Management, Credit and Financial Planning - Individual 4
Parenting Skills Training - Individual 4
Internet | Protected Mode: On
100%

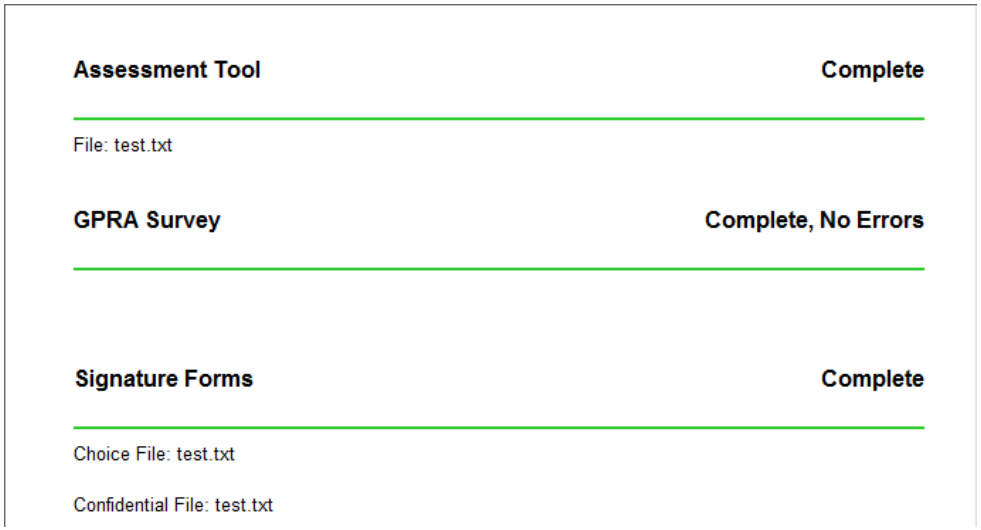
(This is a screenshot of the Service Plan History window.)

© KIT Solutions® 2011

View Voucher Dependencies

The View Voucher Dependencies is a validation tool used within the application to ensure that all the required parts are fulfilled when entering a client's information into the Service Plan. You are able to save the Service Plan if there are validation errors, but you will not be able to submit the Service Plan if there are errors.

1. If your Service Plan has errors, when you click the Submit (Submit) button you will receive an error message.
2. The View Voucher Dependencies (View Voucher Dependencies) button enforces validation errors when creating the Service Plan.
3. A new window will open displaying the various parts entered into the Service Plan.
4. To close the new website window, click on the X (X) in the upper right hand corner.
5. Once you have corrected the errors, you will be able to submit the Service Plan.



(This is a sample screenshot of the Voucher Dependencies form.)

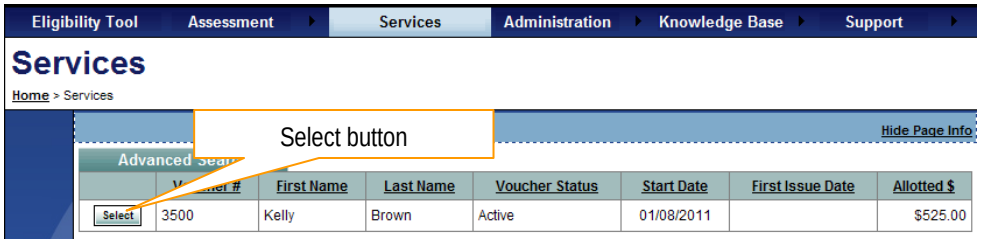
© KIT Solutions® 2011

SERVICES

The Services module is designed to track the voucher treatment and recovery support service transactions within the application.

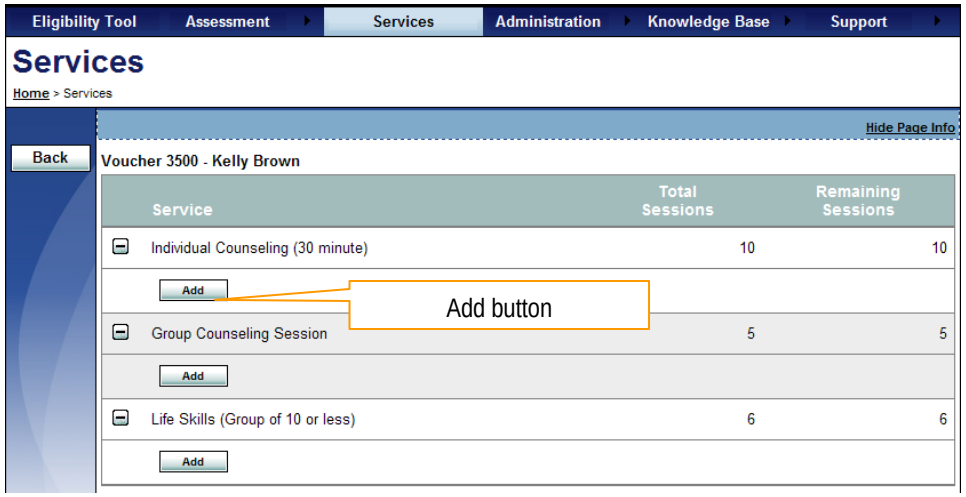
Add a Service Record

1. Click **Services** from the Menu.
2. From the Listing Page, select the client you wish to enter service information for by clicking the Select (**Select**) button to the left of the Voucher ID.



(This is a sample screenshot of the Services Listing Page.)

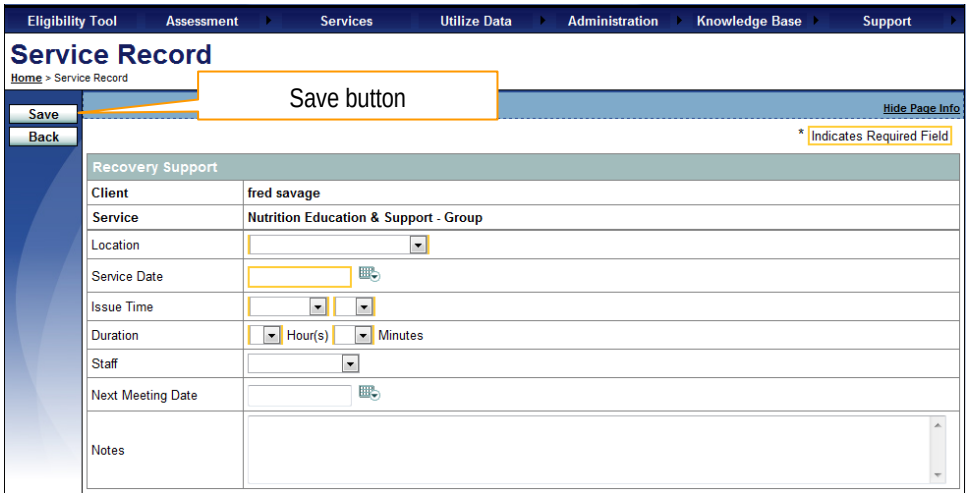
3. Click the ⊞ (**plus sign**) to the left of the appropriate service. The ⊞ (**plus sign**) will become a ⊟ (**minus sign**). To close the description, click on the ⊟ (**minus sign**).
4. To add session information, click the Add (**Add**) button.



(This is a sample screenshot of the Services Page.)

© KIT Solutions® 2011

5. Fill in the required fields and any optional fields you desire.
6. Click the Save (Save) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (Cancel) button.
7. Click the Back (Back) button to return to the Listing page.



(This is a sample screenshot of the Individual Counseling Service Page.)

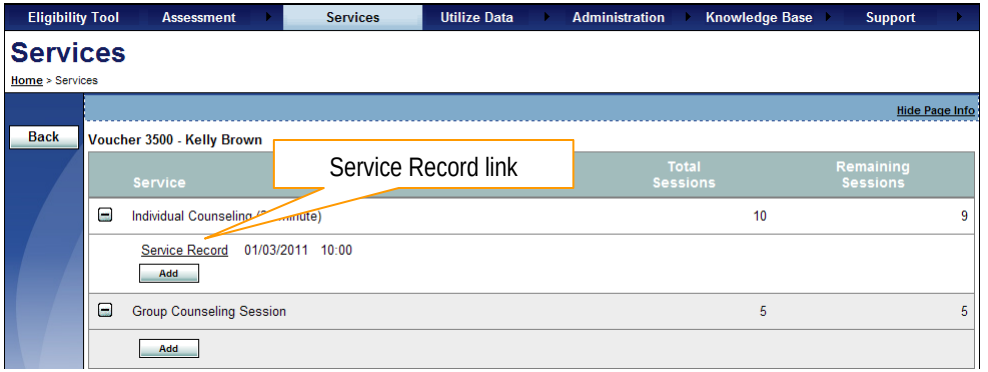
Tips

- Services are entered at the State Level into the Service Plan for each client. The clients that have your organization selected as the Service Provider will display when you enter in the various tabs within the application.
- The duration field is a required field based on the billing type of service.

© KIT Solutions® 2011

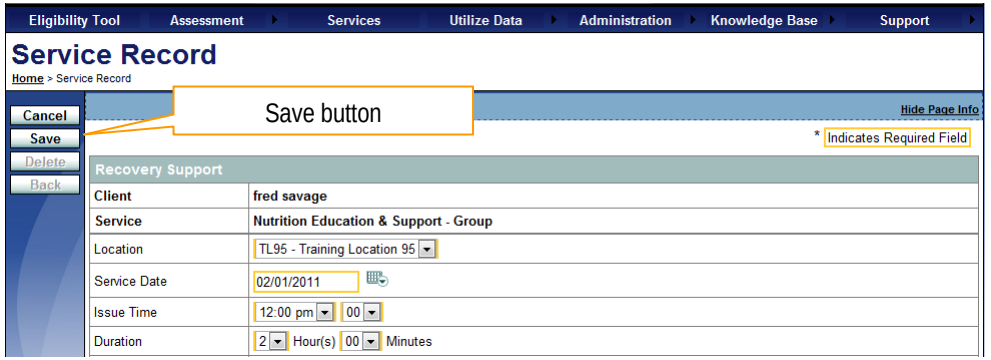
Editing a Service Record

1. From the Services Listing page, click the Select (Select) button next to the voucher that has the service that needs updated.
2. From the Services Page, click the ⊞ (plus sign) next to the service type that needs edited.
3. Select the Service Record you wish to edit by clicking on the appropriate Service Record link.



(This is a sample screenshot of the Services Page.)

4. Click the Edit (Edit) button from the left toolbar.
5. The Service Record will appear in the edit mode.
6. Make any changes needed to the details.
7. Click the Save (Save) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (Cancel) button.
8. Click the Back (Back) button to return to the Listing page.

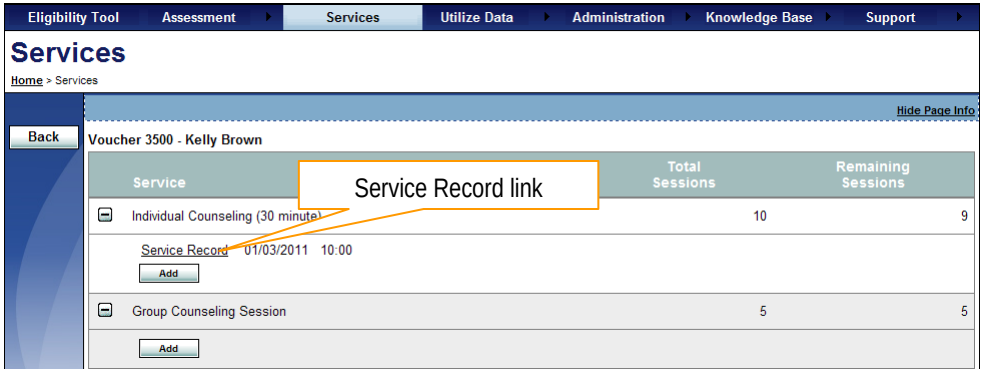


(This is a sample screenshot of the Individual Counseling Service Page.)

© KIT Solutions® 2011

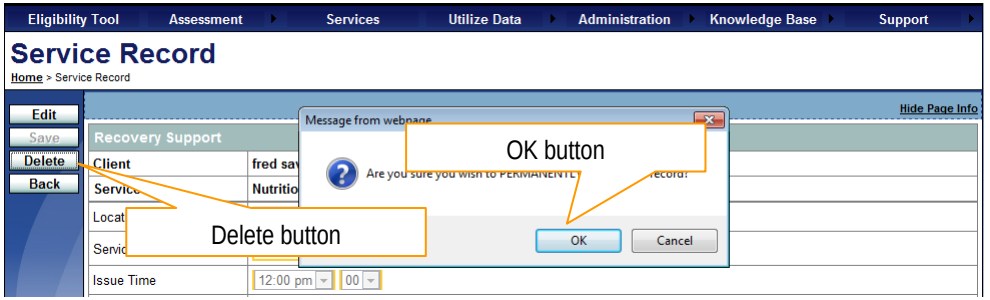
Deleting a Service Record

1. From the Services Listing page, click the Select (Select) button next to the voucher that has the service that needs deleted.
2. From the Services Page, click the ⊞ (plus sign) next to the service type that needs deleted.
3. Select the Service Record you wish to delete by clicking on the appropriate Service Record link.



(This is a sample screenshot of the Services Page.)

4. The Service Record will appear in the edit mode.
5. Click the Delete (Delete) button from the left toolbar.
6. You will receive a message asking if you are sure. Click the OK (OK) button to continue deleting the client.
   *Note: To cancel the deletion, click the Cancel (Cancel) button.



(This is a sample screenshot of the Individual Counseling Service Page.)

Tips

- Services can be deleted if the service has not been fiscally approved. If the service has been fiscally approved then the service can only be deleted up to 14 days after the fiscal approval date.

© KIT Solutions® 2011

UTILIZE DATA

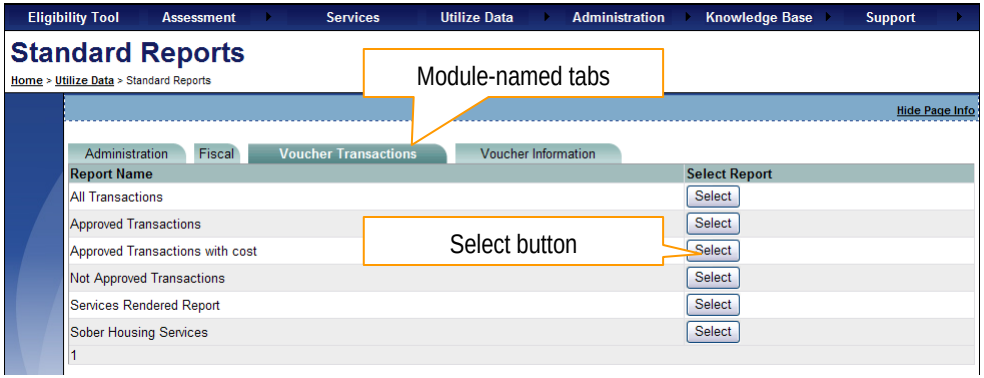
The Utilize Data module is designed to generate reports to assist with tracking, monitoring and assessing voucher information.

Standard Reports

The Standard Reports module enables you to have the ability to get specific voucher, fiscal and administration information through reports.

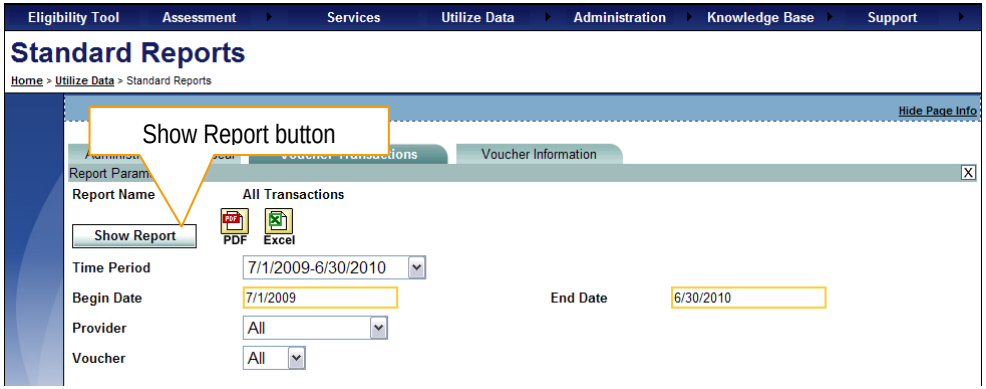
Selecting a Standard Report

1. Click **Utilize Data** from the Menu.
2. Click **Standard Reports** from the Utilize Data Landing Page.
3. Select the type of report you wish to view/print from the module-named tabs (i.e. Administration, Voucher Transactions, etc.)
4. Select the report you wish to view/print by clicking the Select (**Select**) button.



(This is a screenshot of the Standard Reports Page.)

5. Select any filtering parameters, if applicable.
6. Click the Show Report (**Show Report**) button.
7. A new window will open. To close the new window, click on the (X) in the upper right corner.
8. Click on the (X) in the upper right corner to return to the list of reports or click the module-named tab.



(This is a screenshot of the Standard Reports Page.)

© KIT Solutions® 2011

Tips

- The PA ATR Application has the print icon for easier access to viewing reports, you may need to have Active X installed on your computer to utilize the icon. Active X is a free download that should allow you to use the print icon, click on the link to access the Active X site: http://www.download.com/windows/activex/1921-2206_4-0.html if you are unable to download Active X, contact your organization's IT department.
- If you have a pop-up blocker on your computer, hold the ctrl key on your keyboard down while selecting any button used to view the forms (e.g., Confidential Release Forms, PDF, etc.).

© KIT Solutions® 2011

ADMINISTRATION

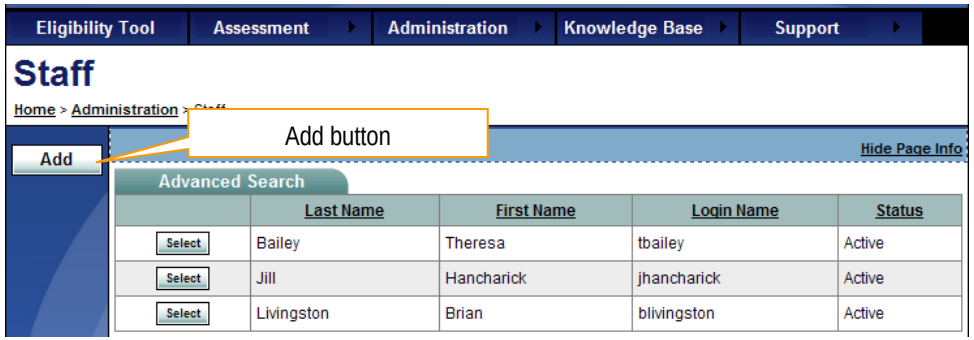
The Administration module is designed to complete administrative tasks within the application, such as updating organization information, staff registration, and changing a password.

Staff

The Staff module is used to register any staff members that should have access to the data entered within the application.

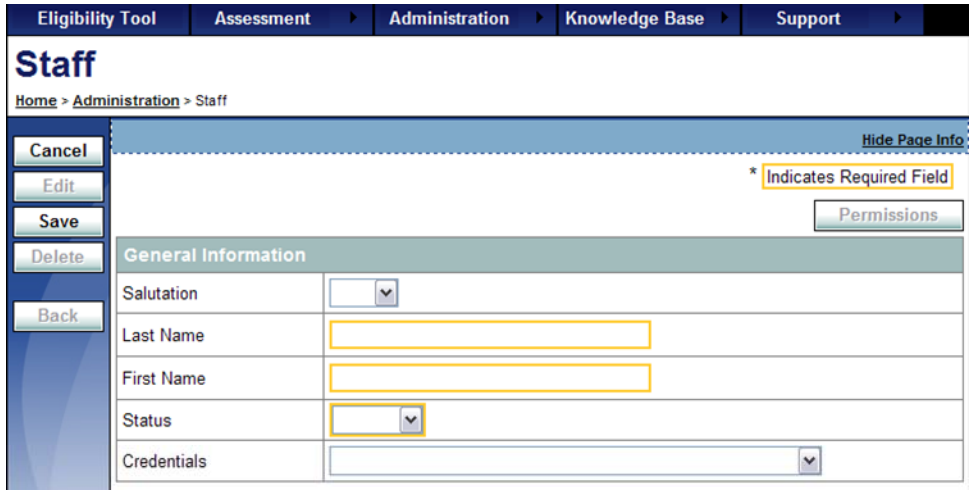
Adding a Staff Member

1. Click **Administration** from the Menu.
2. Click **Staff** from Administration Landing Page.
3. Click the Add (**Add**) button.



(This is a sample screenshot of the Staff Listing Page.)

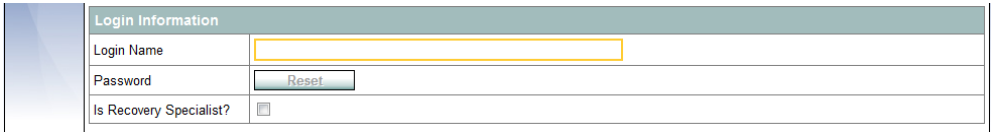
4. Enter the staff member's **General Information**.
   a. Select the staff member's salutation from the **Salutation** dropdown list. This is an optional field.
   b. Enter the staff member's first name in the **First Name** field.
   c. Enter the staff member's last name in the **Last Name** field.
   d. The **Status** is defaulted to *Active*.
      i. *Active*: the staff member is currently with your organization (can be viewed on other screens and reports).
      ii. *Inactive*: the staff member is no longer with your organization (will no longer appear on other screens and reports).
   e. Select the staff member's credential from the **Credentials** dropdown list. This is an optional field.



(This is a partial screenshot of the Manage Staff Profile General Information fields.)

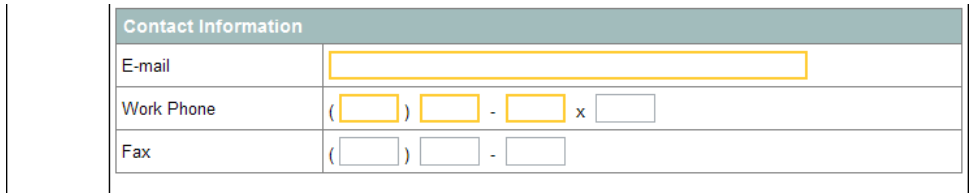
© KIT Solutions® 2011

5. Enter the staff member's **Login Information**.
    a. Enter a **Login Name** for the staff member. This will be the User ID used by the staff member upon login.
    b. A **Password*** will be assigned to the staff member. The staff member should receive an email to activate the account. See the Account Activation section for additional information.
    c. If the staff member will be a Recovery Specialist, check the **Is Recovery Specialist?** checkbox.



(This is a screenshot displaying the Staff Login Information fields.)

6. Enter the staff member's **Contact Information**.
    a. Enter the staff member's email address in the **E-mail** field.
    b. Enter the staff member's work telephone number in the **Work Phone** field.
    *Note: The Work Phone must be filled out in three fields. The fourth field is optional for an extension number.
    c. Enter the staff member's fax number in the **Fax** field. This is an optional field.
7. Click the Save (**Save**) button from the left toolbar.
    *Note: To exit the screen without saving any details, click the Cancel (**Cancel**) button.
8. Click the Back (**Back**) button to return to the Listing page.



(This is a screenshot displaying the Staff Contact Information fields.)

Tips

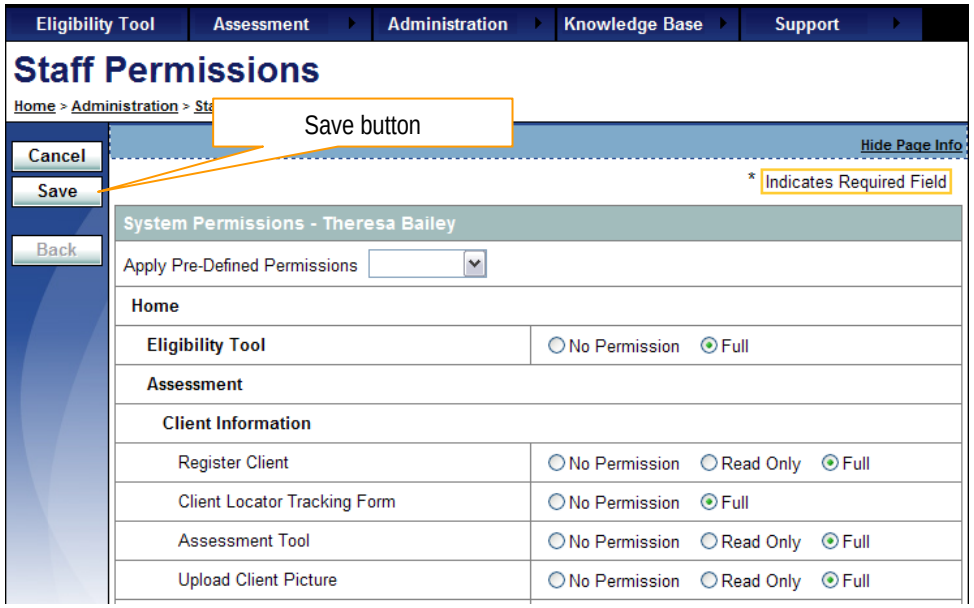
- Setting the **Status*** to ***Inactive*** is used to keep the staff members in the database for history purposes but removed from all of the staff lists on the forms. When a staff member leaves your organization you will not be able to delete the staff member, but you can change the **Status*** to ***Inactive*** to remove their name from forms and prevent the staff member from entering the application.
- If the email address is updated on the staff account, the staff member will need to re-activate their account.

© KIT Solutions® 2011

Permissions

The Staff Permissions module allows a user to assign permissions to access the forms within ATR.

1. From the Staff Edit form, click the Permissions (Permissions) button.
2. Click the Edit (Edit) button from the left toolbar.
3. Select a permission role from the Apply Pre-Defined Permissions dropdown list. See the Apply Pre-Defined Permissions section for additional information.
4. If you wish to modify the pre-defined permissions, select the radio button next to the appropriate permission level for each module.
    a. *No Permission*: staff member has no access to the module
    b. *Read Only*: staff member is able to view the data only
    c. *Full*: staff member is able to view, add, edit, and delete the data
5. Click the Save (Save) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (Cancel) button.
6. Click the Back (Back) button to return to the Staff edit form.



(This is a sample screenshot of the Staff Permissions Edit form)

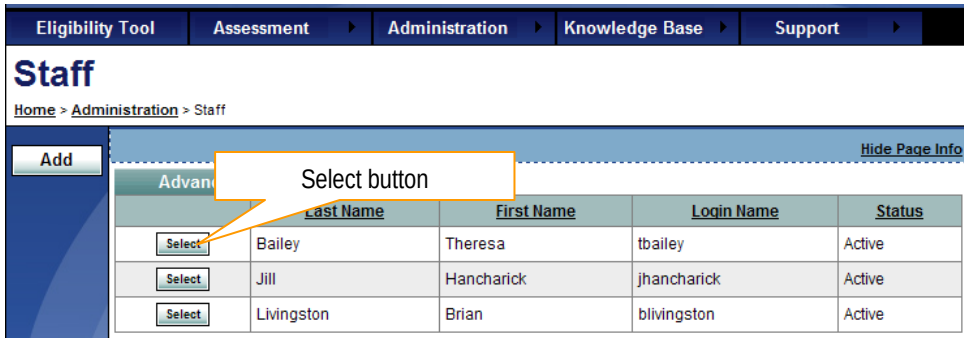
Tips

- When changing permissions, the account must log out for the change in the permission level to take place.

© KIT Solutions® 2011

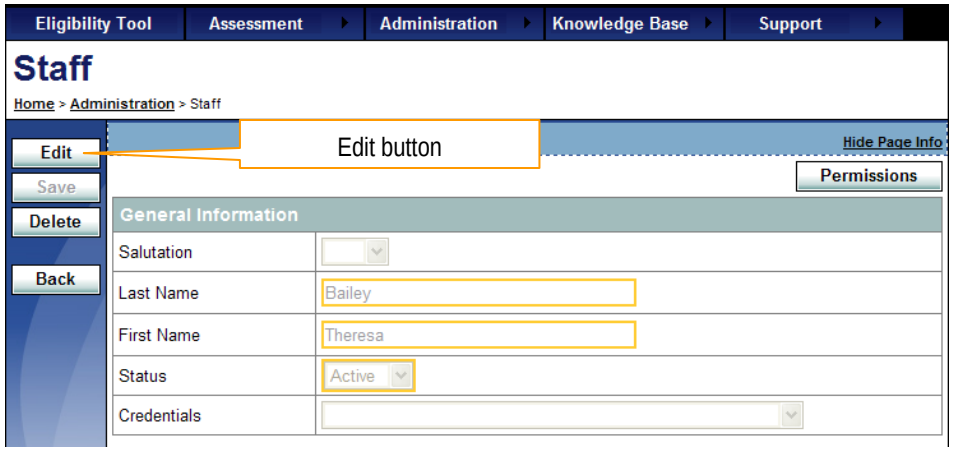
Editing a Staff Member

1. Click **Administration** from the Menu.
2. Click **Staff** from Administration Landing Page.
3. Select the staff member you wish to edit by clicking the Select (**Select**) button to the left of the staff member's name.



(This is a sample screenshot of the Staff Listing Page.)

4. Click the Edit (**Edit**) button from the left toolbar.
5. The staff member will appear in the edit mode.
6. Make any changes needed to the details.
7. Click the Save (**Save**) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (**Cancel**) button.
8. Click the Back (**Back**) button to return to the Listing page.

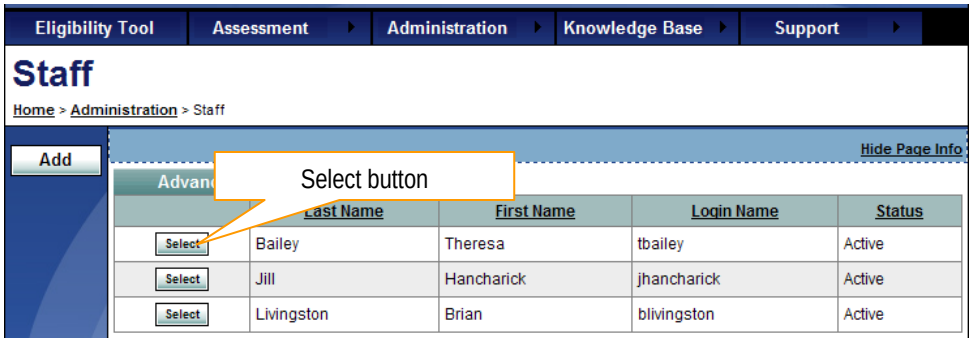


(This is a sample screenshot of the Staff Edit Form.)

© KIT Solutions® 2011

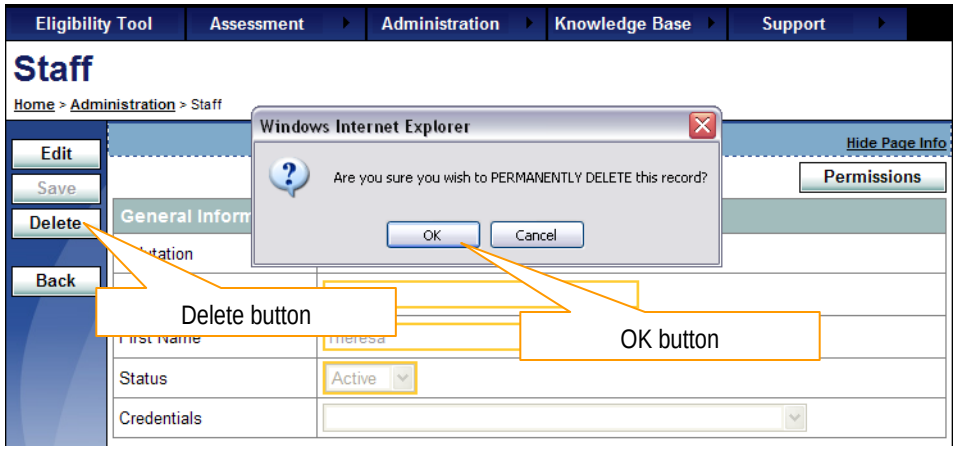
Deleting a Staff Member

1. Click **Administration** from the Menu.
2. Click **Staff** from Administration Landing Page.
3. Select the staff member you wish to delete by clicking the Select (**Select**) button to the left of the staff member's name.



(This is a sample screenshot of the Staff Listing Page.)

4. Click the Delete (**Delete**) button from the left toolbar.
5. You will receive a message asking if you are sure. Click the OK (**OK**) button to continue deleting the staff member.
   *Note: To cancel the deletion, click the Cancel (Cancel) button.



(This is a sample screenshot of the Staff Page Edit Form.)

Tips

- You will not be able to delete a staff member if it is associated with any other details. In this instance, set the **Status*** of the staff member to ***Inactive***.

© KIT Solutions® 2011

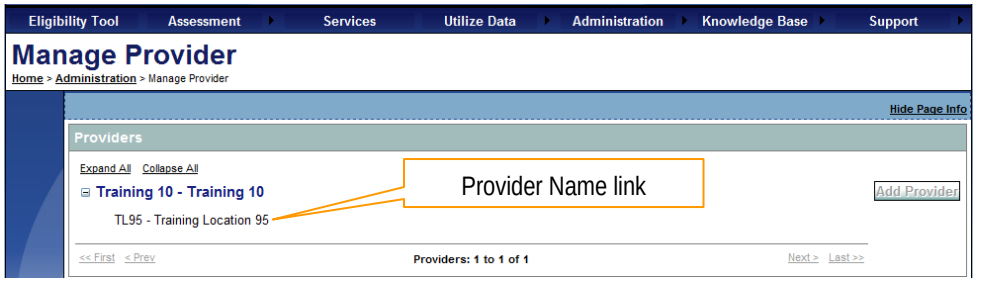
Manage Provider

The Manager Provider module allows the user to add and edit locations and contact and service information for providers and Locations. This information only needs to be updated on an as-needed basis.

*Note: The staff member with the admin permission level is the only person capable of editing this screen within each organization.

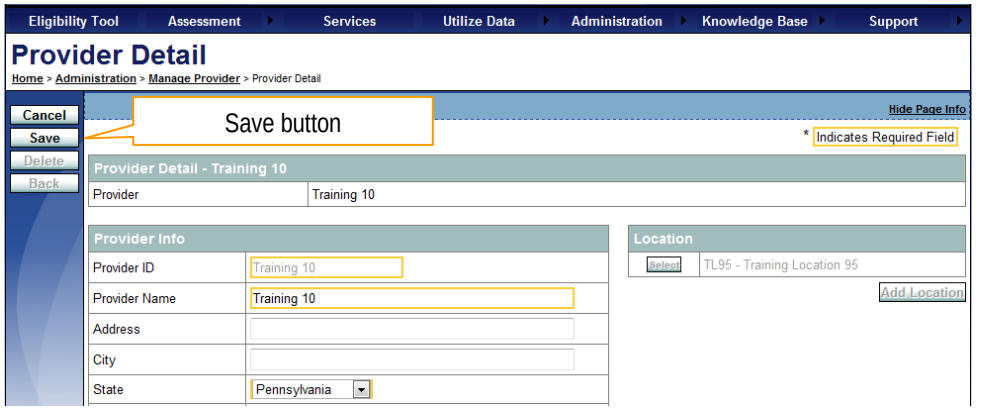
Viewing and Editing Provider Details

1. Click **Administration** from the Menu.
2. Click **Manage Provider** from the Administration Landing Page.
3. Click the **Provider Name** link.



(This is a sample screenshot of the Manage Provider Listing Page.)

4. Click the Edit (**Edit**) button from the left toolbar.
5. Edit the Provider Info to include your organization's information.
6. Select a staff member to serve as the primary contact for your organization from the Staff dropdown list.
   *Note: The email, work phone, and fax will populate with information added from the Staff module.
7. Click the Save (**Save**) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (**Cancel**) button.
8. Click the Back (**Back**) button to return to the Listing page.



(This is a sample screenshot of the Provider Detail Edit form)

Tips

- Only the state can change the Provider ID and Provider Name information. If any information is incorrect for your organization, submit a request through the online support site Contact Support link or contact the state.

© KIT Solutions® 2011

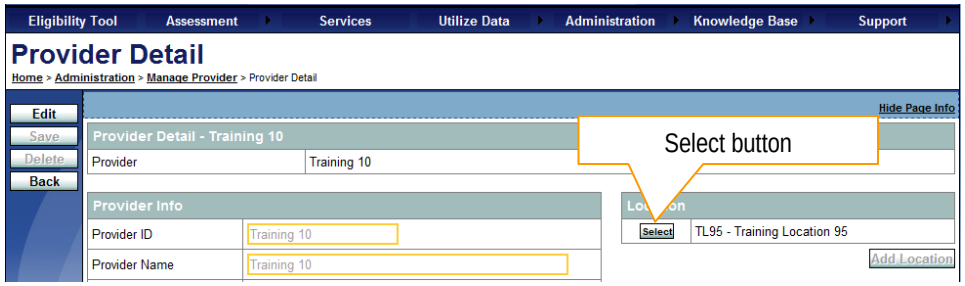
Viewing and Editing Location Details

The Location Info can be accessed in two (2) ways:

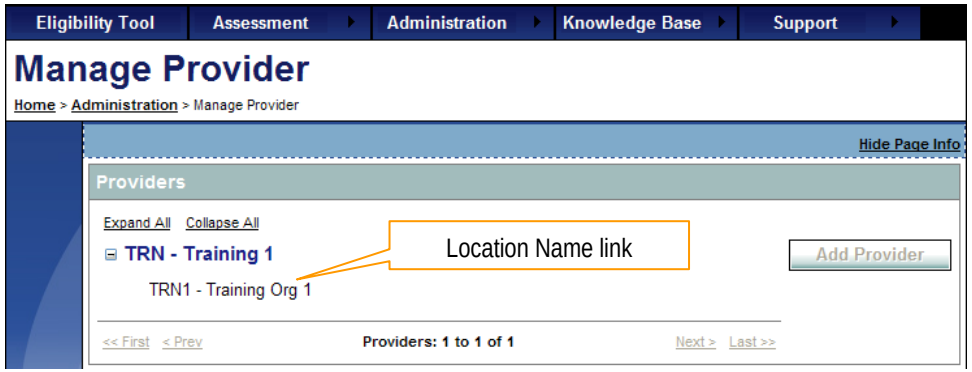
1. From the Provider Details page, click the Select (Select) button from the Locationss grid.

   or

1. Click Administration from the Menu.
2. Click Manage Provider from the Administration Landing Page.
3. Click the Provider Name link to display the Locations associated with it.
4. Click the Location Name link.

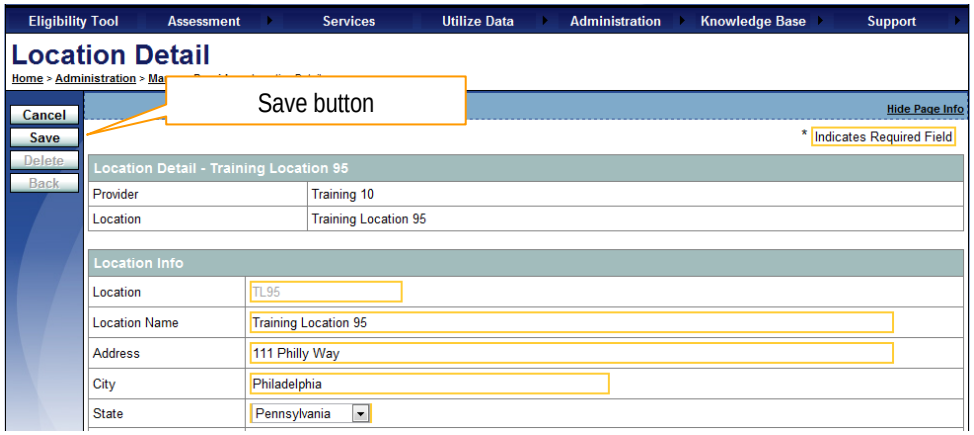


(Access Way 1: Sample screenshot displaying the Provider Detail edit form)



(Access Way 2: Sample screenshot displaying the Manage Provider Listing page)

1. Click the Edit (Edit) button from the left toolbar.
2. Edit the Location Info to include your location's information.
3. Select a staff member to serve as the primary contact for your location from the Staff dropdown list.
   *Note: The email, work phone, and fax will populate with information added from the Staff module.
4. Click the Save (Save) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (Cancel) button.
5. Click the Back (Back) button to return to the Listing page.

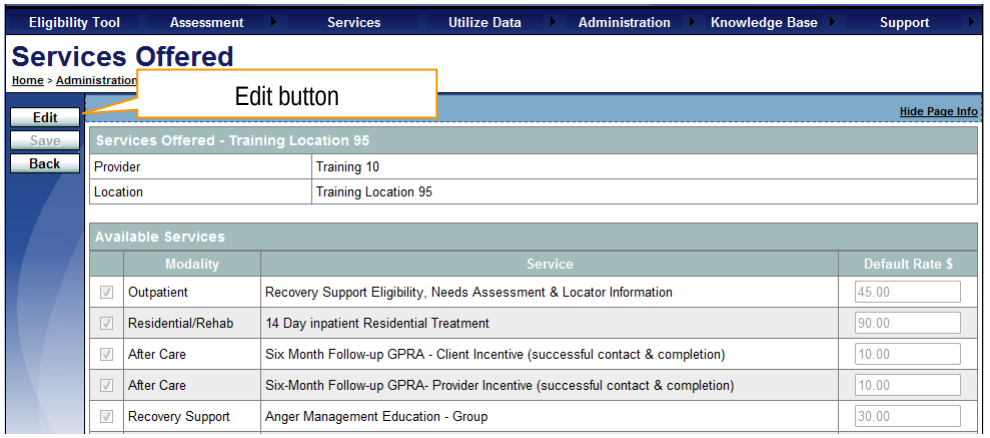


(Sample screenshot displaying the Location Detail edit form)

© KIT Solutions® 2011

Services Offered

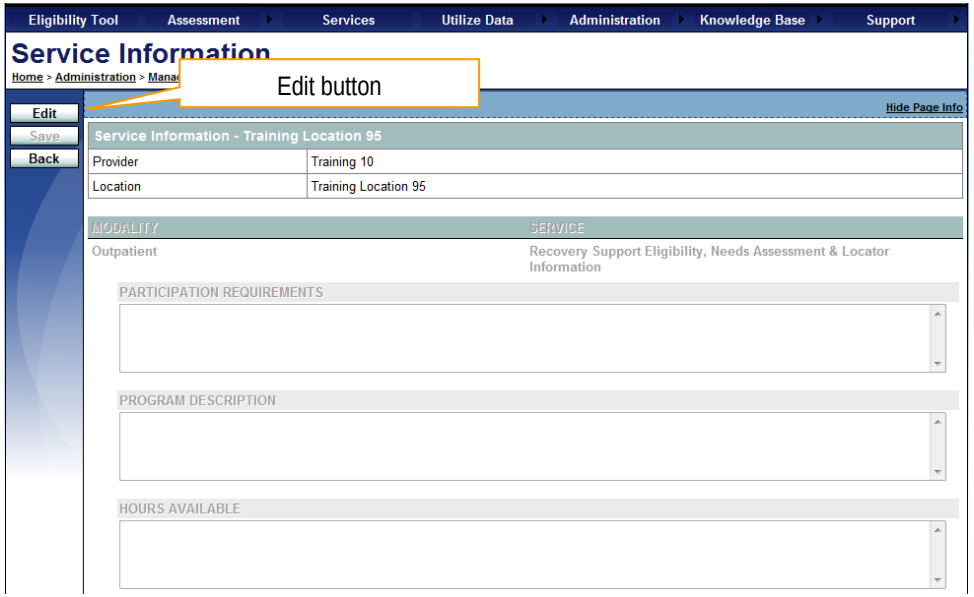
1. From the Location Details edit form, click the Services Offered (Services Offered) button.
2. Click the Edit (Edit) button from the left toolbar.
3. Select the checkboxes to indicate the services you provide. Uncheck the checkboxes for services that your Organization does not provide.
4. Click the Save (Save) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (Cancel) button.
5. Click the Back (Back) button to return to the Listing page.



(This is a sample screenshot of the Services Provided page.)

Service Information

6. From the Location Details edit form, click the Service Descriptions, Requirements, Availability (Service Descriptions, Requirements, Availability) button.
7. Click the Edit (Edit) button from the left toolbar.
8. For each service you provide, enter the Participation Requirements, Program Description, and Hours Available information in the appropriate text boxes.
9. Click the Save (Save) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (Cancel) button
10. Click the Back (Back) button to return to the Listing page.



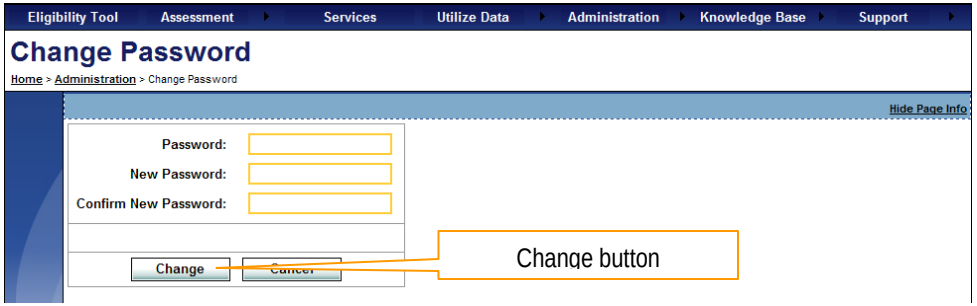
(This is a sample screenshot of the Service Information page.)

© KIT Solutions® 2011

Change Password

The Change Password module allows the user to change the password on the account they are currently logged into.

1. Click **Administration** from the Menu.
2. Click **Change Password** from the Administration Landing Page.
3. Enter the current password for the account in the **Current Password** field.
4. Enter a password you would like to use in the **New Password** field.
5. Re-type the new password in the **Confirm New Password** field.
6. Click the Change (**Change**) button.
   *Note: To exit the screen without saving any changes, click the Cancel (**Cancel**) button.
7. You will receive a confirmation message indicating the password was changed successfully. Click OK (**OK**) to continue.



(This is a screenshot of the Change Password Page.)

Tips

- It is important to remember that passwords are case sensitive.
- Passwords must have a minimum 8 characters in length, have 1 upper case character, have 1 number, and cannot use User ID as part of password.
- You will be prompted to change your password every 90 days.

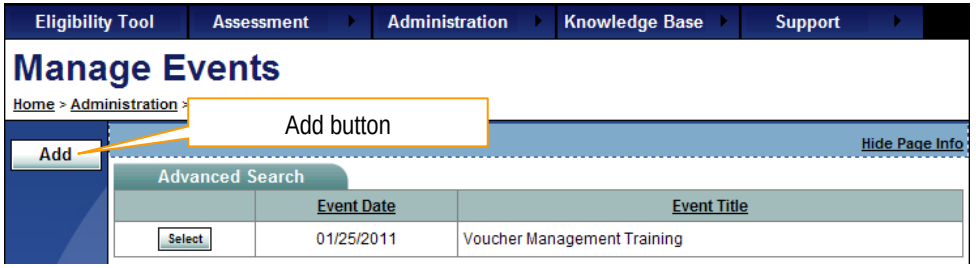
© KIT Solutions® 2011

Manage Events

The Manage Events module is designed to add, edit or delete events in the Events Calendar. Events added at provider level will only be viewed by that provider.

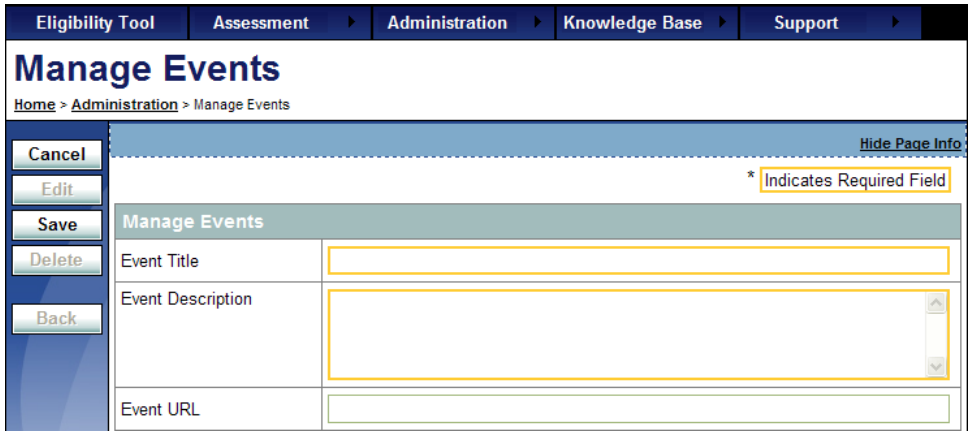
Adding an Event

1. Click **Administration** from the Menu.
2. Click **Manage Events** from the Administration Landing Page.
3. Click the Add (**Add**) button from the left toolbar.



(This is a sample screenshot of the Manage Events Listing Page.)

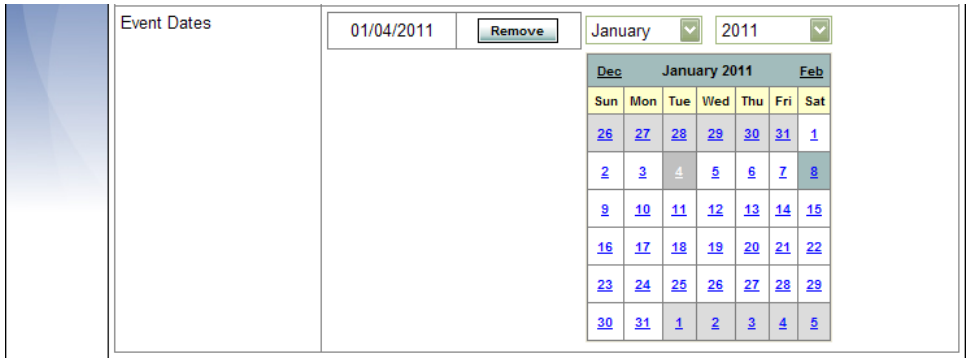
4. Enter a brief description of the event in the **Event Title** field.
5. Enter the description of the event in the **Event Description** field.
6. If there is a website associated with the event, enter the website address in the **Event URL** field.



(This is a partial screenshot of the Manage Events edit form)

© KIT Solutions® 2011

7. Select the date(s) the event will take place using the **Event Dates** calendar. You may select multiple dates.
    a. Select the month the event will take place from the first dropdown list. This is defaulted to the current month.
    b. Select the year the event will take place from the second dropdown list. This is defaulted to the current year.
    c. Select the days the event will take place using the calendar.
        ii. To remove a selected date, click the (**Remove**) button to the right of the date.
8. Click the Save (**Save**) button from the left toolbar.
*Note: To exit the screen without saving any changes, click the Cancel (**Cancel**) button.
9. Click the Back (**Back**) button to return to the Listing page.

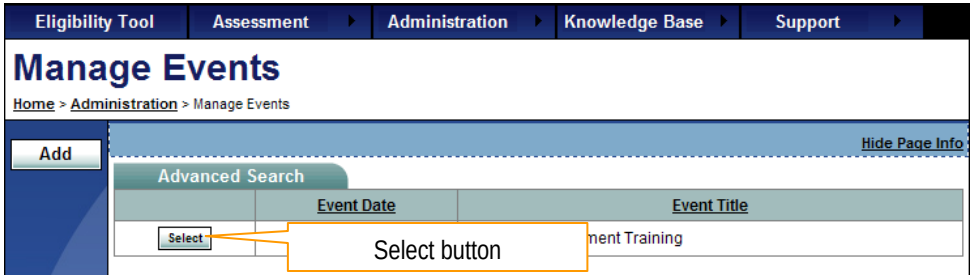


(This is a partial screenshot of the Manage Events edit form)

© KIT Solutions® 2011

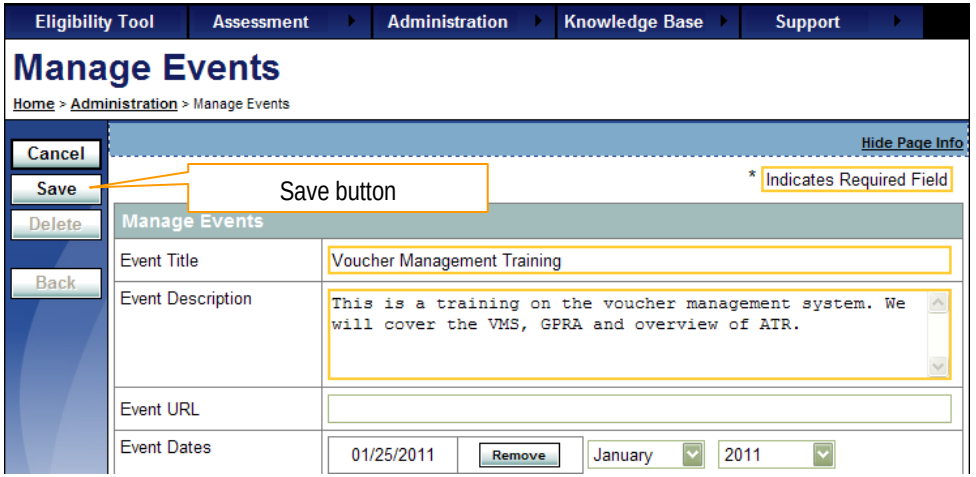
Editing an Event

1. Click **Administration** from the Menu.
2. Click **Manage Events** from the Administration Landing Page.
3. Select the event you wish to edit by clicking the Select (**Select**) button to the left of the event date.



(This is a sample screenshot of Manage Events Listing Page.)

4. Click the Edit (**Edit**) button from the left toolbar.
5. The event will appear in the edit mode.
6. Make any changes needed to the details.
7. Click the Save (**Save**) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (**Cancel**) button.
8. Click the Back (**Back**) button to return to the Listing page.

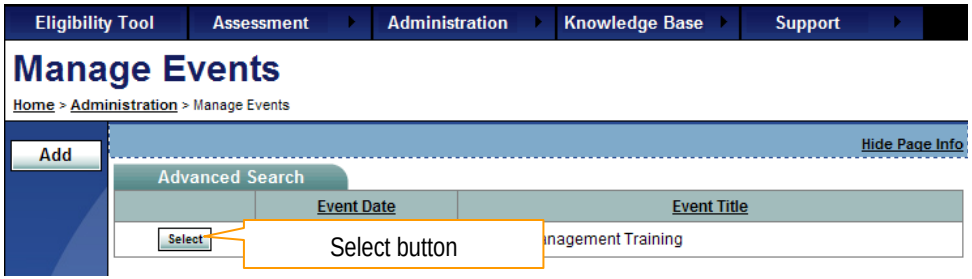


(This is a partial screenshot of the Manage Events edit form)

© KIT Solutions® 2011

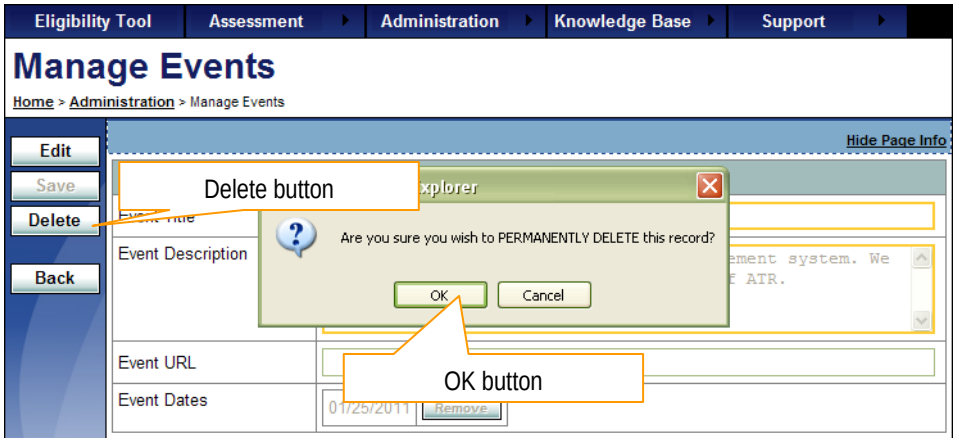
Deleting an Event

1. Click **Administration** from the Menu.
2. Click **Manage Events** from the Administration Landing Page.
3. Select the event you wish to delete by clicking the Select (**Select**) button to the left of the event date.



(This is a sample screenshot of Manage Events Listing Page.)

4. Click the Delete (**Delete**) button from the left toolbar.
5. You will receive a message asking if you are sure. Click the OK (**OK**) button to continue deleting the event.
   *Note: To cancel the deletion, click the Cancel (**Cancel**) button.



(This is a partial screenshot of the Manage Events edit form)

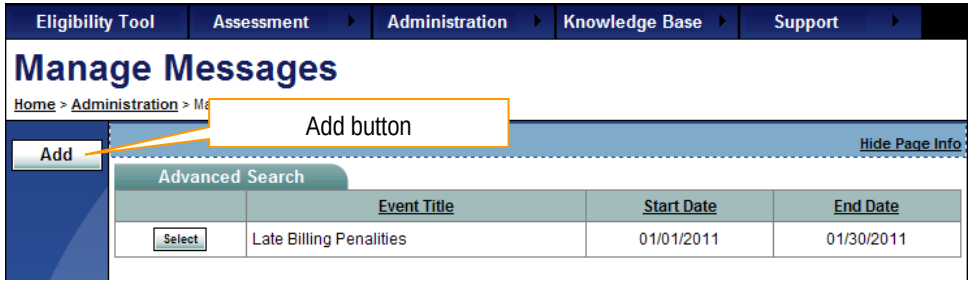
© KIT Solutions® 2011

Manage Messages

The Manage Messages module is designed to add, edit or delete messages that display on the Home screen. Messages added at county level will only be viewed by that county and their providers.

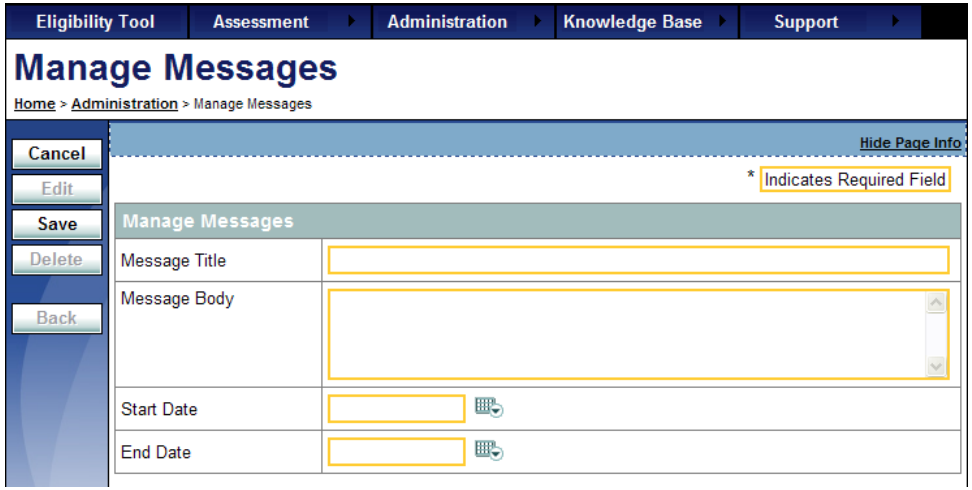
Adding a Message

1. Click **Administration** from the Menu.
2. Click **Manage Messages** from the Administration Landing Page.
3. Click the Add (**Add**) button from the left toolbar.



(This is a sample screenshot of Manage Messages Listing Page.)

4. Enter a brief description of the message in the **Message Title** field.
5. Enter the description of the message in the **Message Body** field.
6. Enter the **From Date*** and the **To Date*** for when you would like the message to be displayed as mmddyyyy or select the dates by clicking on the calendar . (See Calendar section for further details)
7. Click the Save (**Save**) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (Cancel) button.
8. Click the Back (**Back**) button to return to the Listing page.

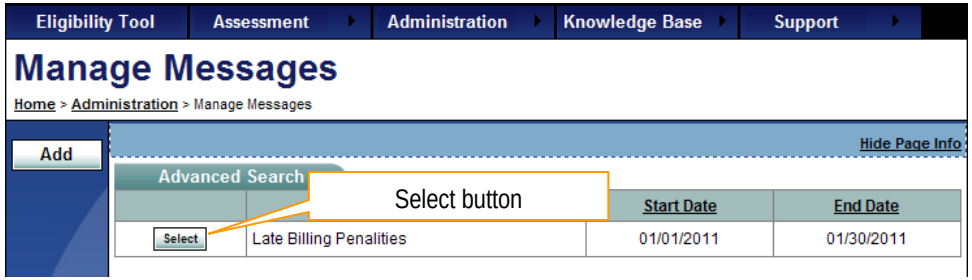


(This is a screenshot of the Manage Messages edit form.)

© KIT Solutions® 2011

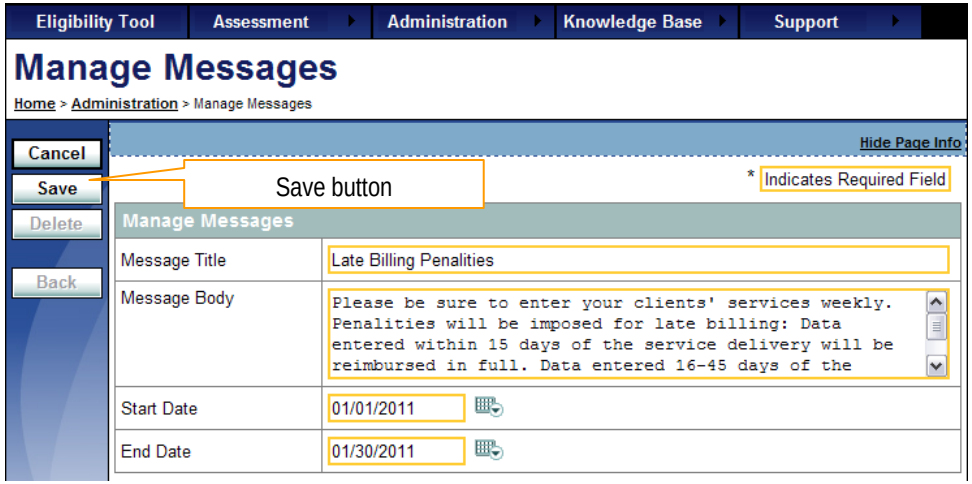
Editing a Message

1. Click **Administration** from the Menu.
2. Click **Manage Messages** from the Administration Landing Page
3. Select the message you wish to edit by clicking the Select (**Select**) button to the left of the message title.



(This is a sample screenshot of Manage Messages Listing Page.)

4. Click the Edit (**Edit**) button from the left toolbar.
5. The message will appear in the edit mode.
6. Make any changes needed to the details.
7. Click the Save (**Save**) button from the left toolbar.
   *Note: To exit the screen without saving any changes, click the Cancel (**Cancel**) button.
8. Click the Back (**Back**) button to return to the Listing page.

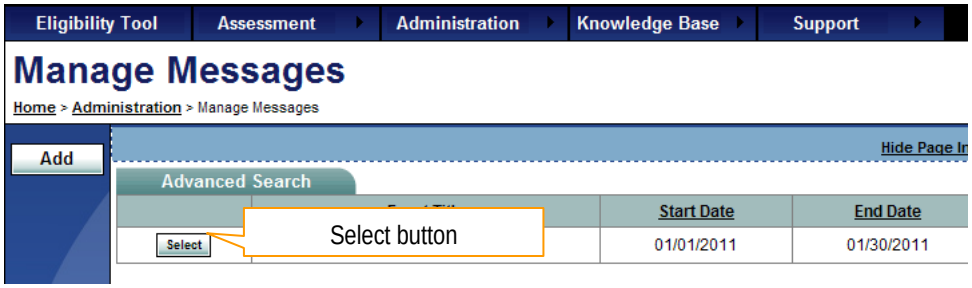


(This is a sample screenshot of the Manage Messages edit form.)

© KIT Solutions® 2011

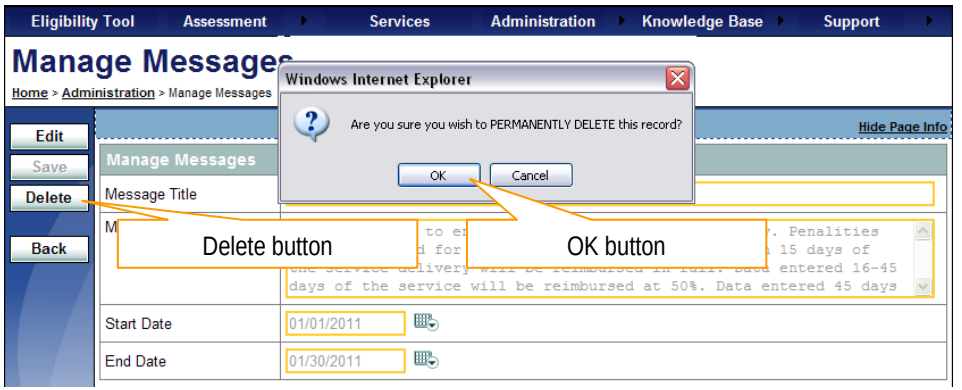
Deleting a Message

1. Click **Administration** from the Menu.
2. Click **Manage Messages** from the Administration Landing Page.
3. Select the message you wish to delete by clicking the Select (**Select**) button to the left of the message title.



(This is a sample screenshot of Manage Messages Listing Page.)

4. Click the Delete (**Delete**) button from the left toolbar.
5. You will receive a message asking if you are sure. Click the OK (**OK**) button to continue deleting the event.
   *Note: To cancel the deletion, click the Cancel (**Cancel**) button.



(This is a sample screenshot of the Manage Messages edit form.)

© KIT Solutions® 2011

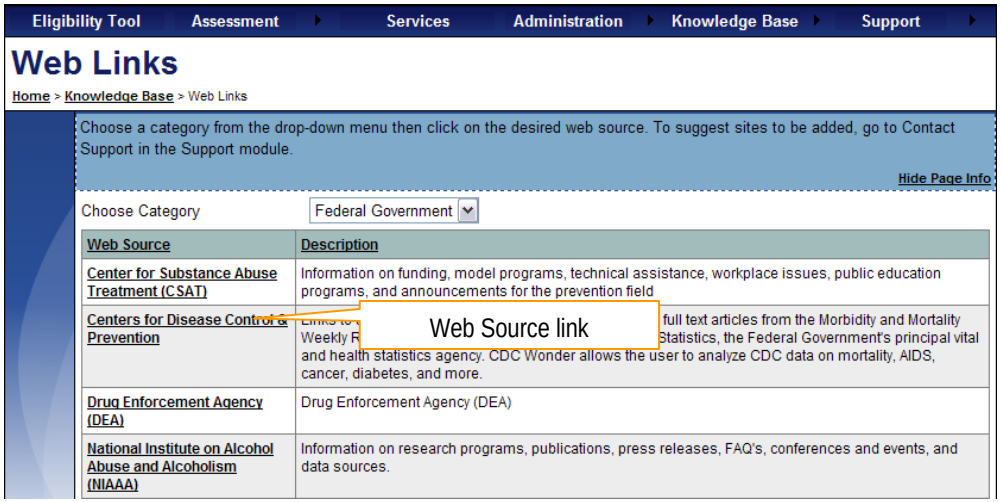
KNOWLEDGE BASE

The Knowledge Base module is a warehouse of documents and web source information designed to provide pertinent data.

Web Links

The Web Sources section of Knowledge Base is useful for finding a wealth of health and human service links. The Web Source section can be utilized by following these steps:

1. Click **Knowledge Base** from the Menu.
2. Click **Web Links** from the Knowledge Base Landing Page.
3. Select a category from the **Choose Category** dropdown list.
4. Browse the Web Sources List for the website you would like to visit.
5. Click on the link of the name of the **Web Source**.
6. A new window will open displaying the website you chose.
7. To close the new website window, click on the ☒ (X) in the upper right hand corner.


Eligibility Tool
Assessment
Services
Administration
Knowledge Base
Support
Web Links
Home > Knowledge Base > Web Links
Choose a category from the drop-down menu then click on the desired web source. To suggest sites to be added, go to Contact Support in the Support module.
Hide Page Info
Choose Category
Federal Government
Web Source
Description
Center for Substance Abuse Treatment (CSAT)
Information on funding, model programs, technical assistance, workplace issues, public education programs, and announcements for the prevention field
Centers for Disease Control & Prevention
Web Source link
full text articles from the Morbidity and Mortality
Statistics, the Federal Government's principal vital
and health statistics agency. CDC Wonder allows the user to analyze CDC data on mortality, AIDS, cancer, diabetes, and more.
Drug Enforcement Agency (DEA)
Drug Enforcement Agency (DEA)
National Institute on Alcohol Abuse and Alcoholism (NIAAA)
Information on research programs, publications, press releases, FAQ's, conferences and events, and data sources.

(This is a partial screenshot of the Web Links Listing Page.)

Tips

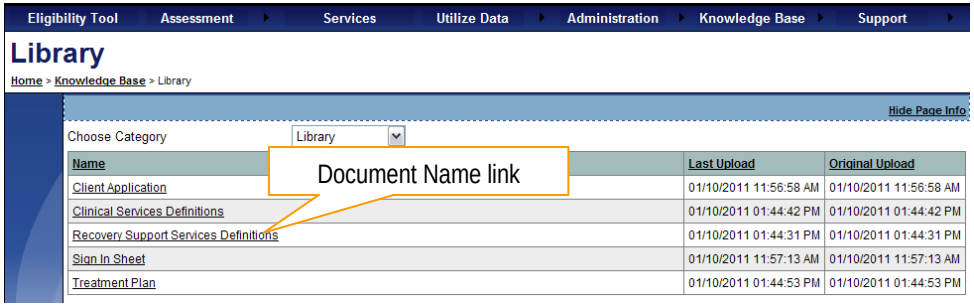
- If you have a pop-up blocker on your computer, hold the ctrl key down while selecting any button used to view the websites.
- On the left column of the table is the Web Source link and on the right column of the table is a description of the website.

© KIT Solutions® 2011

Library

The Library section is a repository of commonly requested documents and other general documents that ATR would like to make available. Use the following instructions to view the Library section.

1. Click **Knowledge Base** from the Menu.
2. Click **Library** from the Knowledge Base Landing Page
3. Select a category from the **Choose Category** dropdown list.
4. Select the document you would like to view by clicking the link of the document Name.
5. The document will open as a new word document.
    a. Click the print button to print the document.
    b. Click the disk button to save the document.
    c. To close the .doc window, click on the (X) in the upper right hand corner.



(This is a screenshot of the Library Listing Page.)

Tips

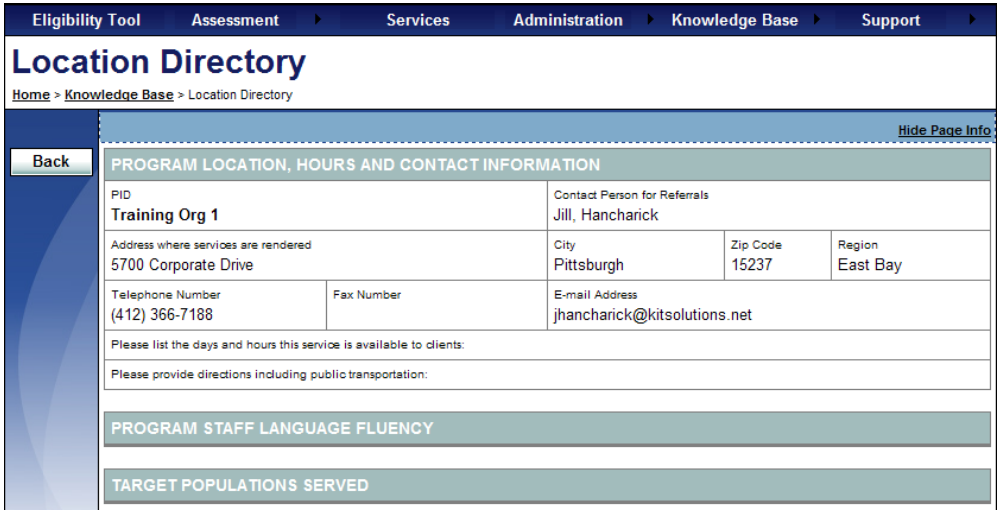
- The documents in the Library section are updated at the state-level.

© KIT Solutions® 2011

Location Directory

The Location Directory section allows you to view details on the different program locations.

1. Click **Knowledge Base** from the Menu.
2. Click **Location Directory** from the Knowledge Base Landing Page
3. Click the Select (**Select**) button to left of the Location you wish to view.
4. The Program Location details will be displayed.



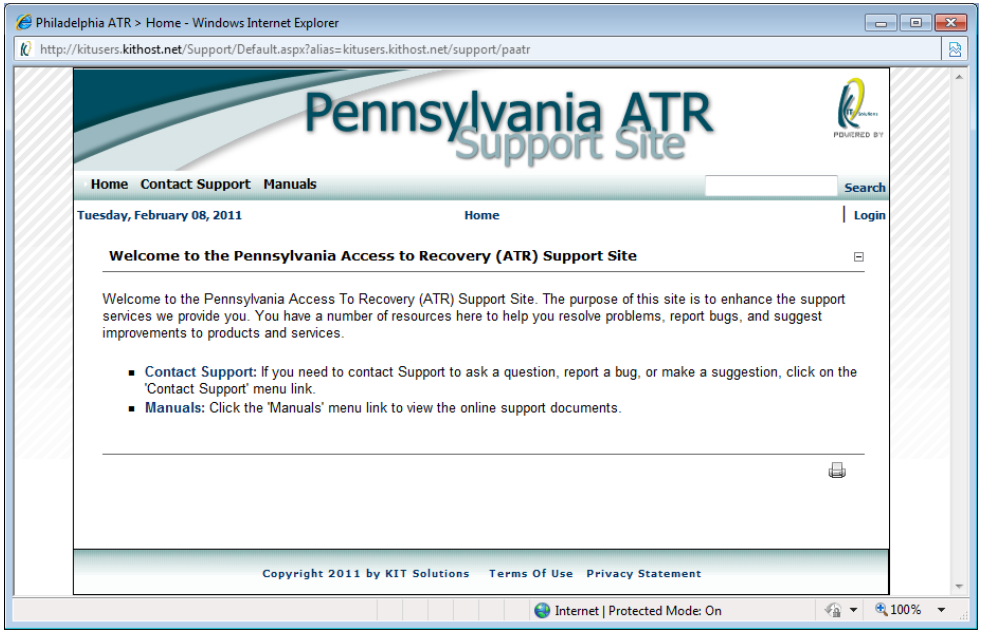
(This is a sample screenshot of the Location Directory Page.)

© KIT Solutions® 2011

Web Site

The PA ATR Support Site offers several features to assist you with using the ATR application.

1. Click **Support** from the Menu.
2. Click **Web Site** from the Support Landing Page.
3. A new window will open displaying the Support Site.
4. To submit a problem, question, or suggestion for improvement, click the **Contact Support** link.
5. To view and download documents pertaining to the ATR application, click the **Library** link.


Philadelphia ATR > Home - Windows Internet Explorer
http://kitusers.kithost.net/Support/Default.aspx?alias=kitusers.kithost.net/support/paatr
Pennsylvania ATR
Support Site
Home
Contact Support
Manuals
Search
Tuesday, February 08, 2011
Home
Login
Welcome to the Pennsylvania Access to Recovery (ATR) Support Site
Welcome to the Pennsylvania Access To Recovery (ATR) Support Site. The purpose of this site is to enhance the support services we provide you. You have a number of resources here to help you resolve problems, report bugs, and suggest improvements to products and services.
Contact Support: If you need to contact Support to ask a question, report a bug, or make a suggestion, click on the 'Contact Support' menu link.
Manuals: Click the 'Manuals' menu link to view the online support documents.
Copyright 2011 by KIT Solutions
Terms Of Use
Privacy Statement
Internet | Protected Mode: On
100%

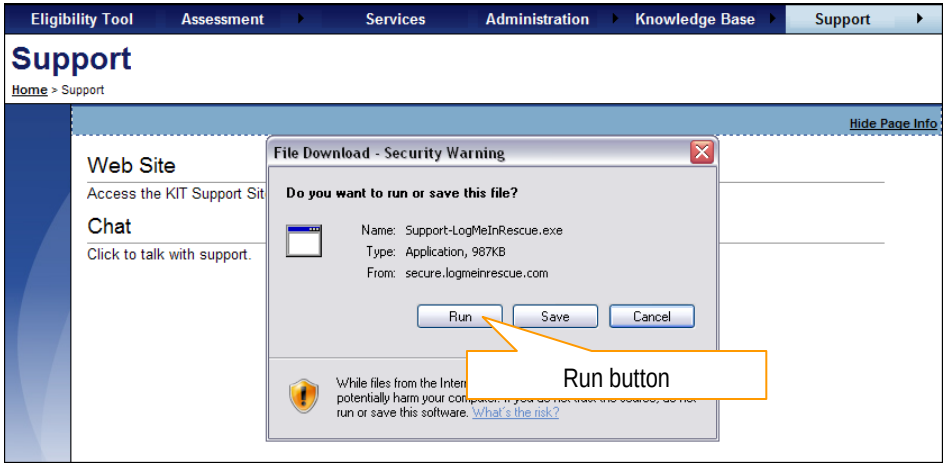
(This is a screenshot of the Support Site Home page.)

 © KIT Solutions® 2011

Chat

The Chat feature allows you to talk to a Support member via instant message. Please note that Support is only available via chat from 9:00AM-5:00PM (EST), Monday-Friday.

1. Click **Support** from the Menu.
2. Click **Chat** from the Support Landing Page.
3. A new window opens prompting you to run the LogMeInRescue application. You must run this application in order to utilize the chat feature. Click the Run (**Run**) button.
4. A Support representative will be with your shortly.



(This is a sample screenshot of the LogMeIn file download message.)

Tips

- You will need to install the LogMeIn applet in order to connect with Support. This is a free download.
- The installation may take a few minutes.

© KIT Solutions® 2011